Modern Requirements4DevOps

Impact Assessment

Version 3.0

Document Revision History

Rev. #	Date	Details	Revised By	Approved By
Version 3.0	31st March, 2023	• Updated “Add Impact from Queries” • Default link type updated in “Add Link” section. • Updates incorporated in Document View, Sorting, and Toggle Options. • Notes tab has been renamed to “Summary”	Syed Hammad	Hammad Masood
Version 2.2	22nd February, 2023	• The installation Guide has been removed from the technote. A separate document for Impact Assessment Installation has been devised	Syed Hammad	Hammad Masood
Version 2.1	14th February, 2023	• New section added “Impact Assessment Installation (Azure Services)”	Syed Hammad	Hammad Masood
Version 2.0	5th January, 2023	• Changed the functionality of displaying information when the toggle filter is applied • Notes tab functionality added	Syed Hammad	Hammad Masood
Version 1.0	16th September, 2022	• Document created	Syed Hammad	Hammad Masood

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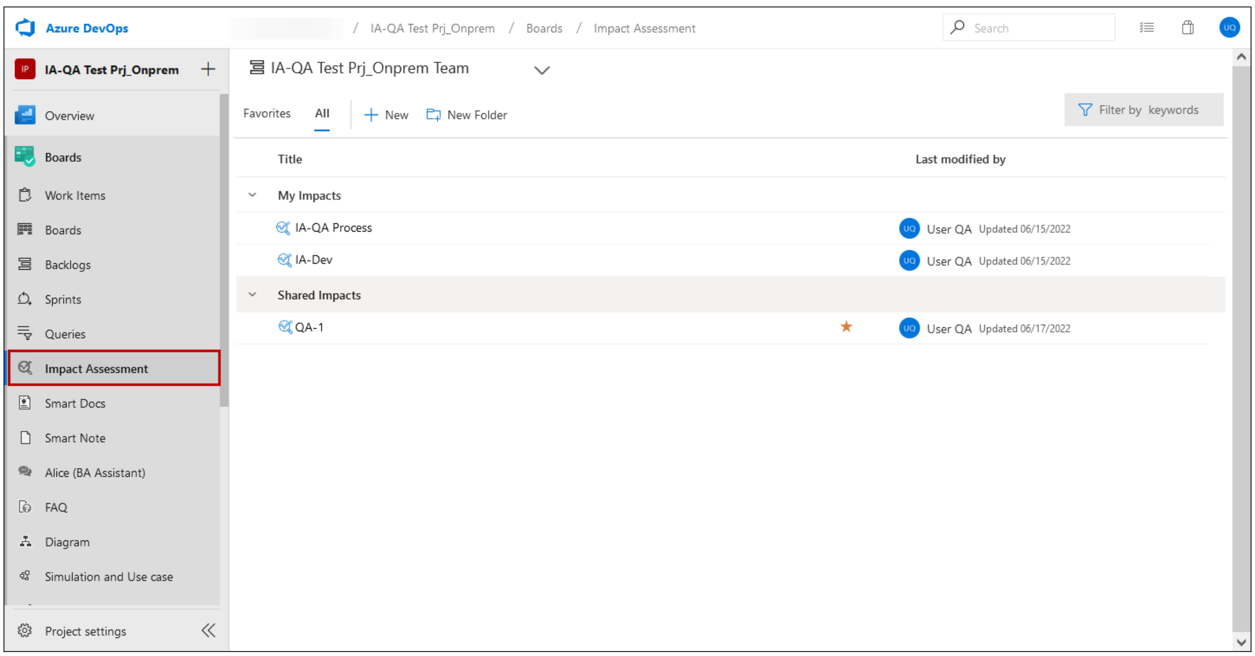
IMPACT ASSESSMENT

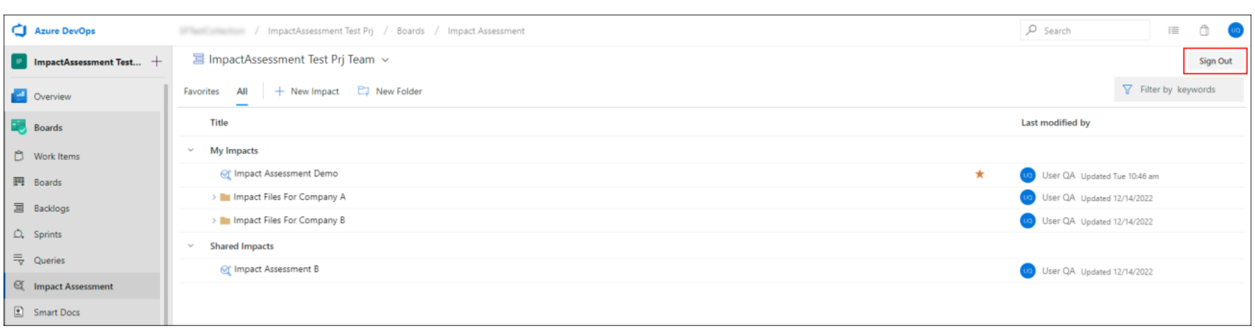
WHAT IS IMPACT ASSESSMENT?

The **Impact Assessment** module for MR4DO allows users to perform impact analysis on a given work item or set of work items which ultimately helps to analyze the impact on the related and subsequent work items. The tool helps the user in identifying the "**to-be-affected**" related work items prior to making any changes to the source work item/root level.

The extension provides an **easy-to-use user interface** that allows marking work items according to the Impact and creating new task(s) to account for the impact/changes.



Note: The **Sign Out** button, as shown in the image below, only appears to those users who have signed in through a floating license.



IMPACT ASSESSMENT USER INTERFACE (UI)

MY IMPACTS & SHARED IMPACTS

The landing page of **Impact Assessment** module comprises of two sections as shown in the image below:

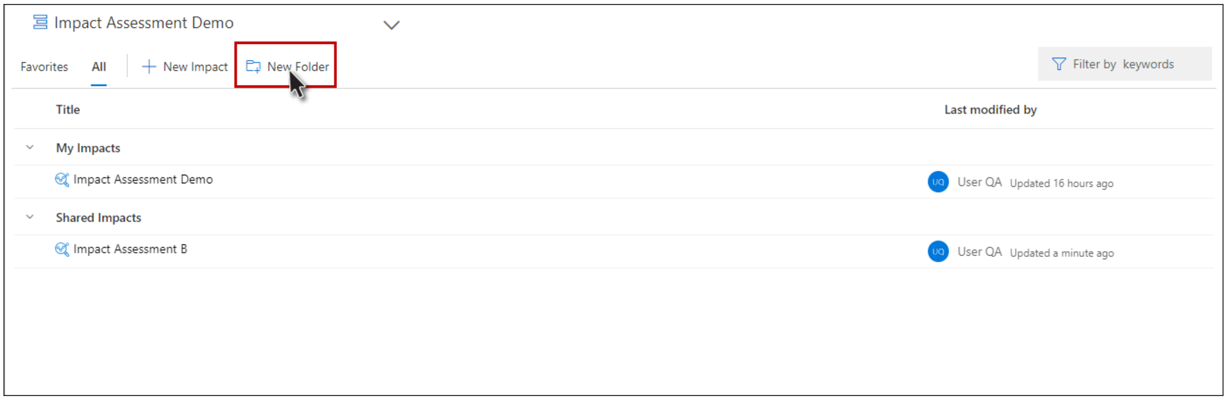
1) **My Impacts:** This section displays the Impacts created by the user himself. Impacts under this section are restricted to the creator only. This means that other users who have access to the project won't be able to access these.

2) **Shared Impacts:** These Impacts could be created by any user and placed under Shared Impacts so that anyone who has access to the project can access it. Shared Impacts created by a project team will be visible within the team members.

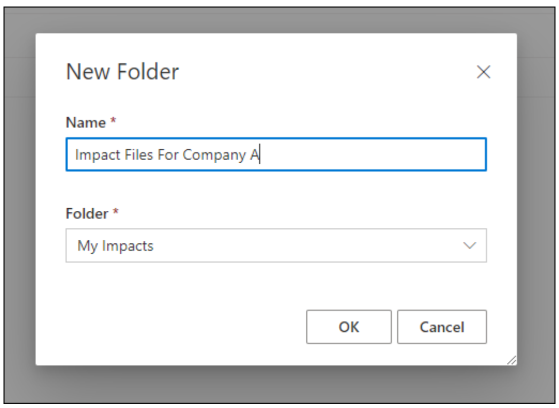
Note: Users can drag and drop Impact files from different folders of **My Impacts** and **Shared Impacts** similar to ADO queries.

NEW FOLDER

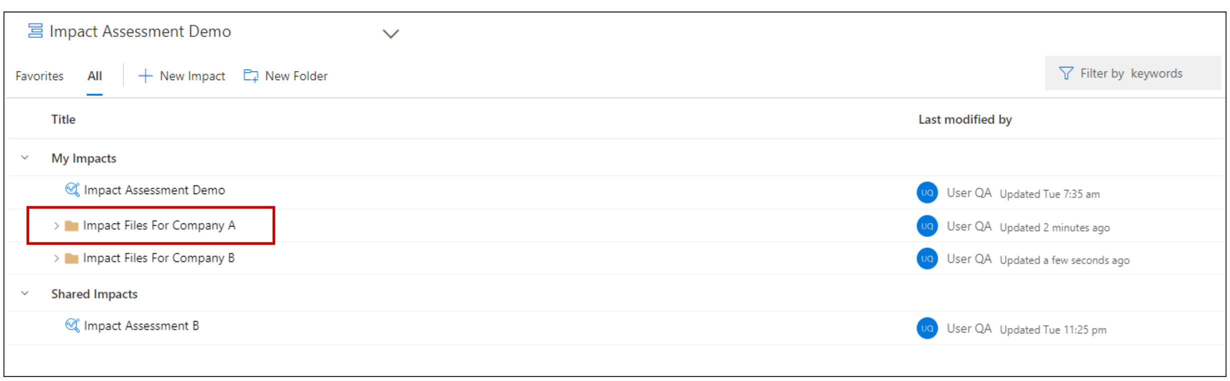
- The "**New Folder**" option allows the user to save and organize Impact files in different folders under "My Impacts" and "Shared Impacts".



- Enter a suitable name for the **New Folder**, select the desired parent folder, and click on the "OK" button.



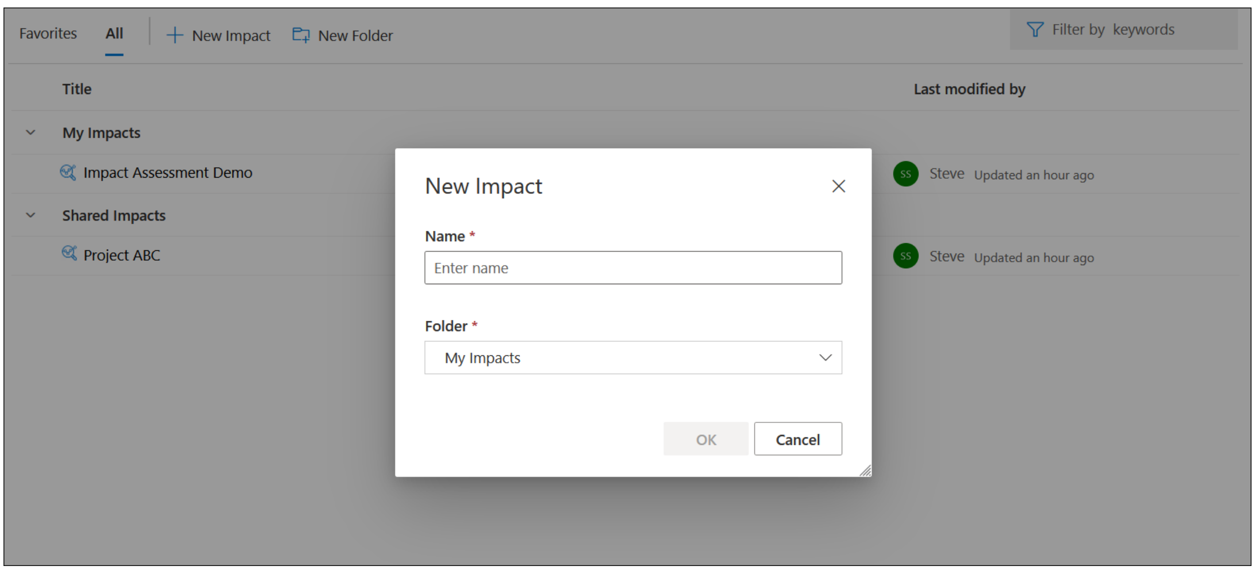
- The desired new folder has been created. The user can create as many new folders as he/she wants in a similar manner.



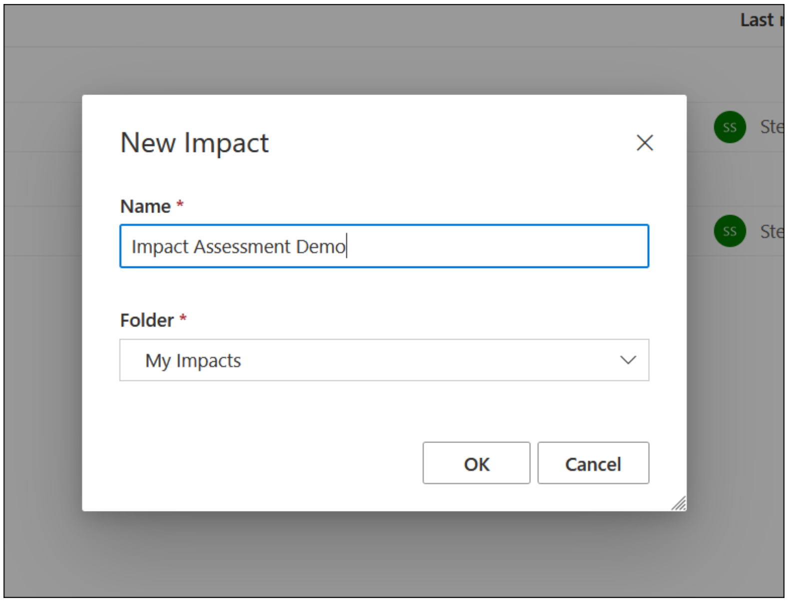
CREATING A NEW IMPACT

1. To create a new Impact, click on the "**New Impact**" option on the main landing page.

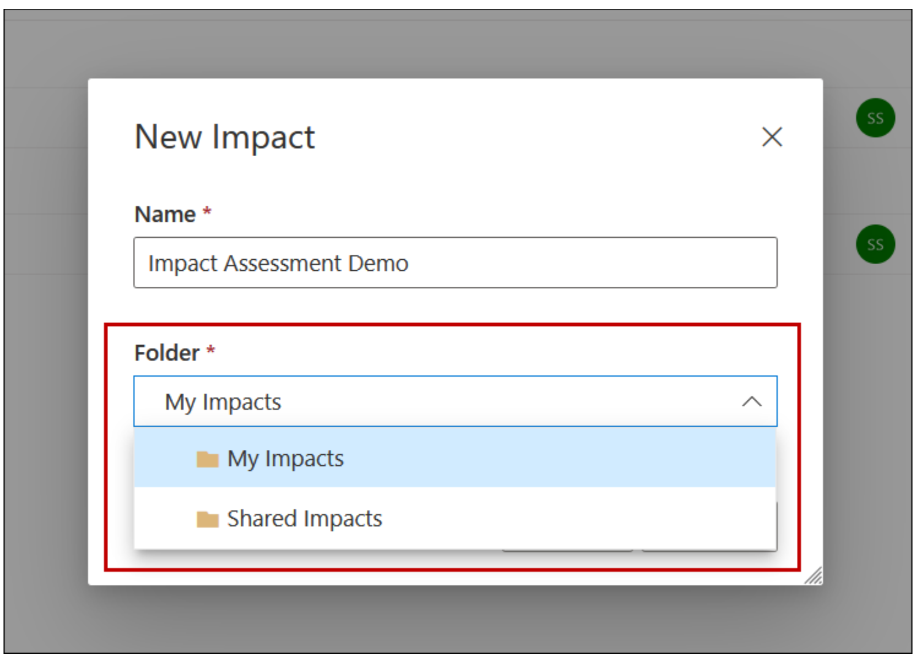
2. Once you click on "**New Impact**", the following "**New Impact**" window will appear.



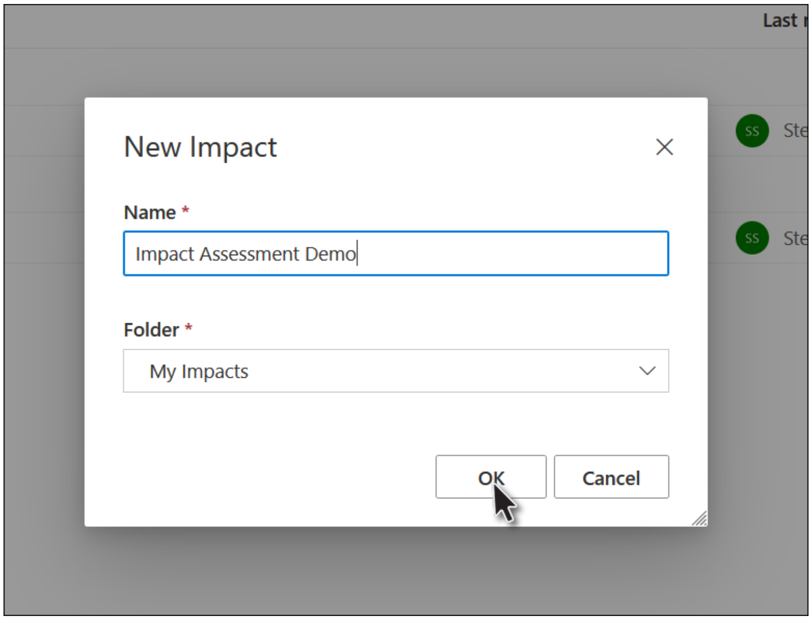
3. Enter a **suitable name** for the Impact/Impact File.



4. Now select where do you want to place the new Impact. Users can choose between **My Impacts** and **Shared Impacts** as shown in the image below.

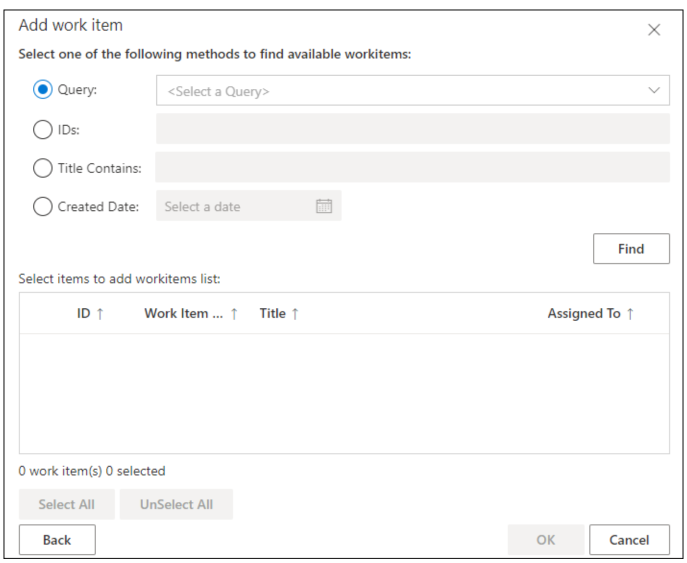


5. Click on the "**OK**" button.



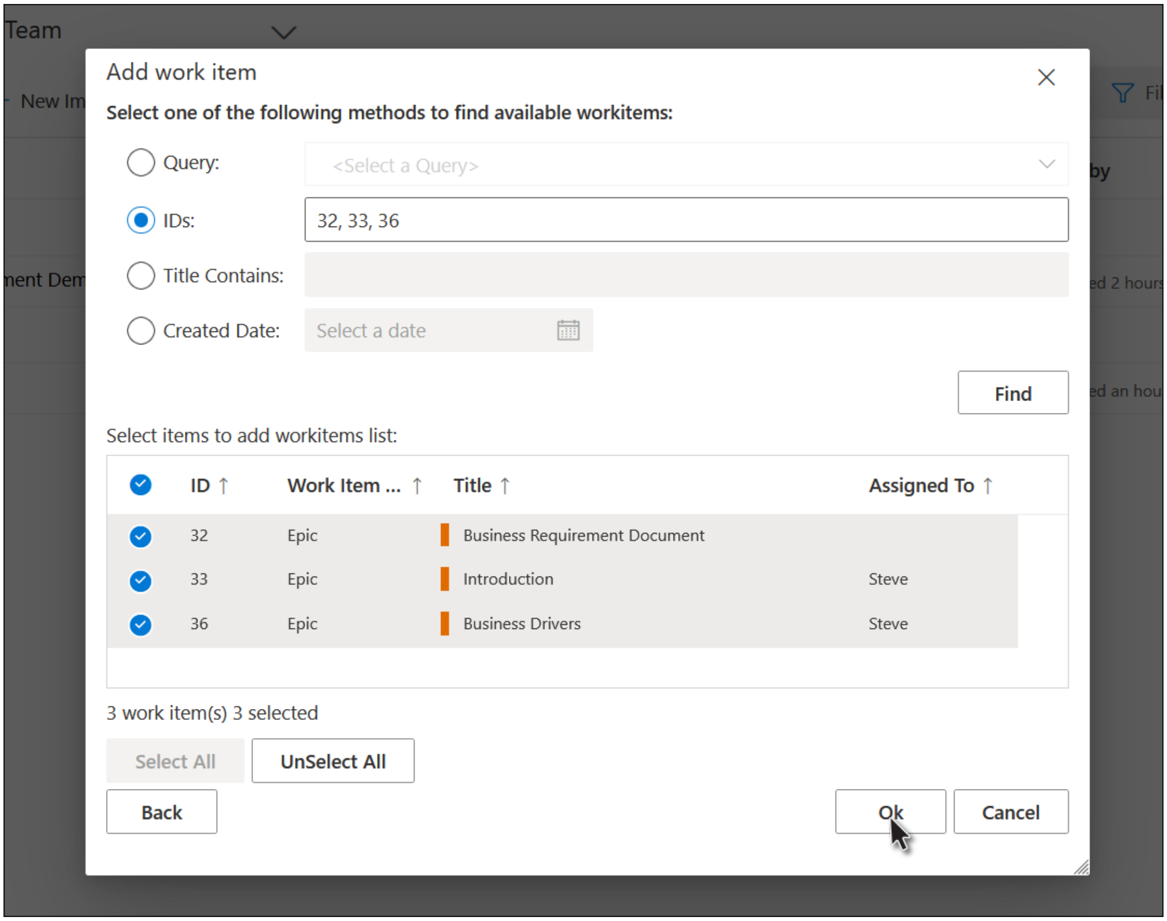
6. The following "**Add Work Item**" window will appear asking you to select the desired Work Items for Impact Assessment.

Note: The option to add work items is only available when the Impact is initiated from the **Impact Assessment** module. When Impact is invoked from Queries/Backlogs this step is eliminated.

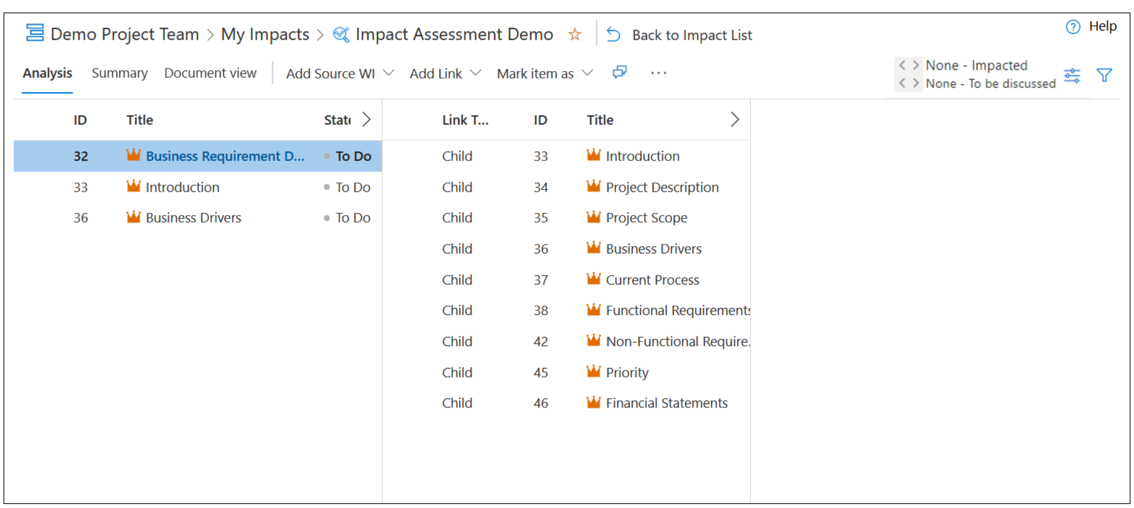


7. Select your desired Work Item(s) for Impact Assessment using **Query**, **IDs**, **Title Contains** or **Created Date**, and click on the "**Ok**" button.

Note: Multiple source work items can be selected by a user for a single Impact file.



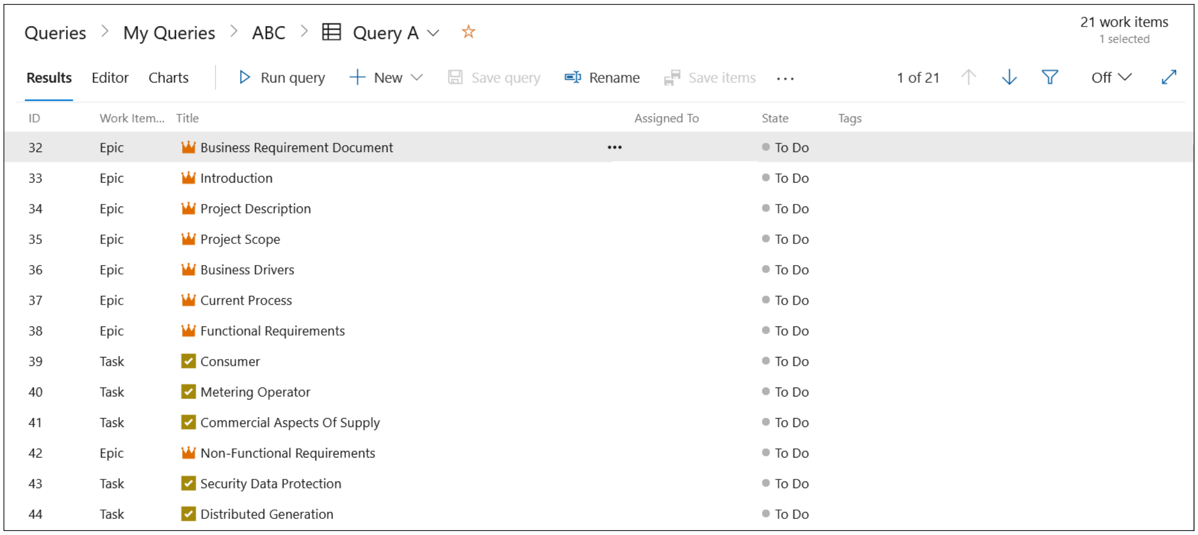
8. A **new Impact has been created** and it can be traced in the folder you opted for earlier.



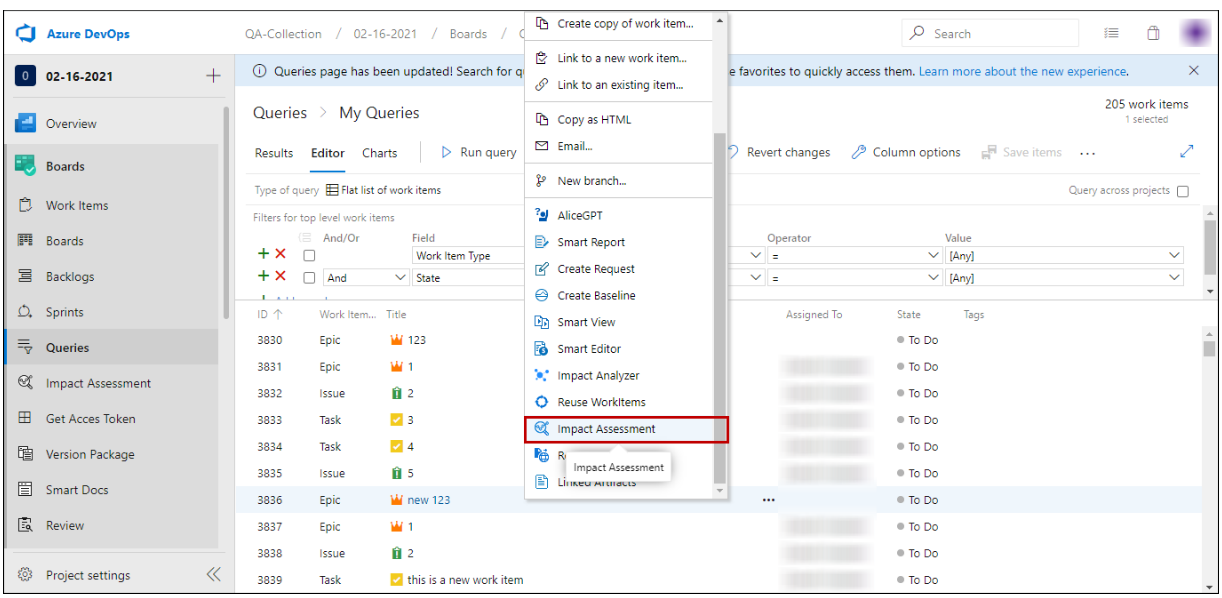
ADD IMPACT FROM BACKLOG & QUERIES

ADD IMPACT FROM QUERIES

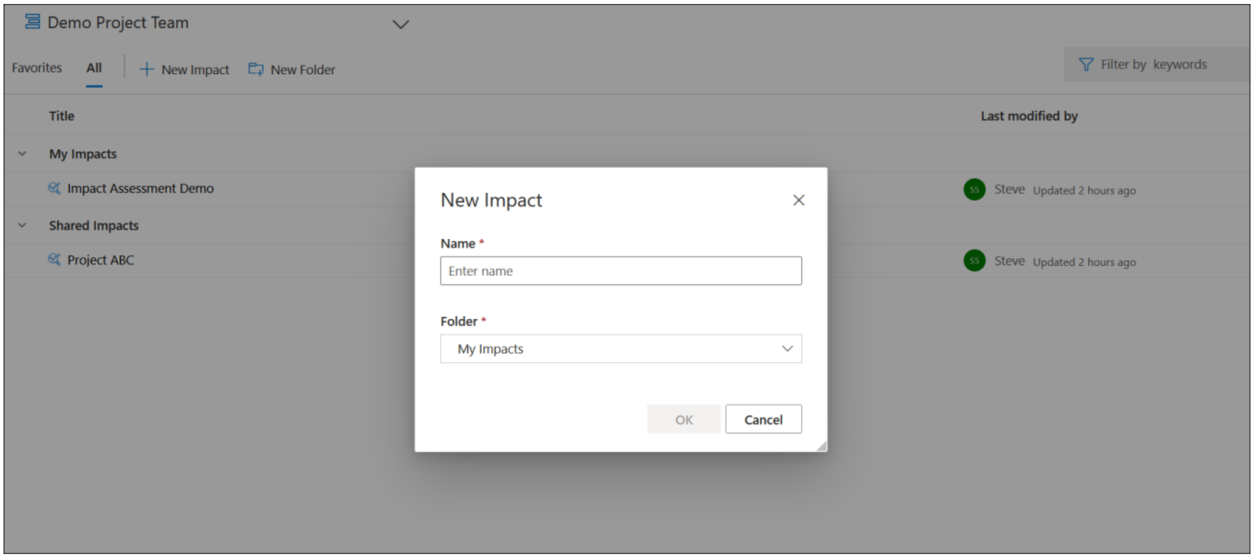
Users can invoke Impact Assessment from **Queries** module.



Users can select one or multiple work items in Queries and then right click for the "**Impact Assessment**" option in the context menu.

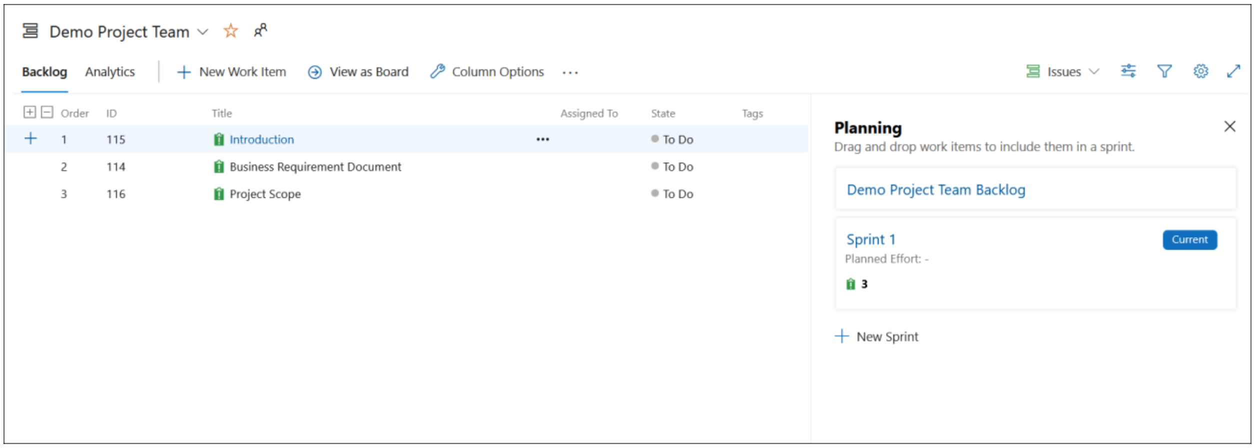


As the "**Impact Assessment**" option is clicked, the user will be navigated to the "**Impact Assessment**" module and the "**New Impact**" window will appear asking the user to enter the name for the Impact and specify the folder for its placement.

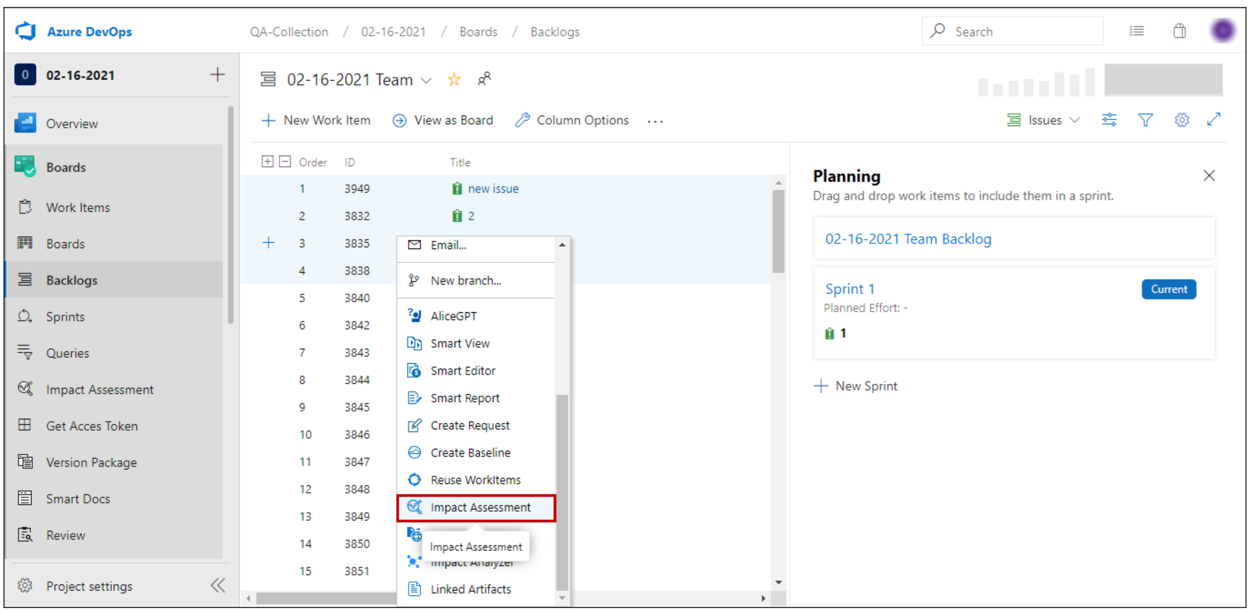


ADD IMPACT FROM BACKLOGS

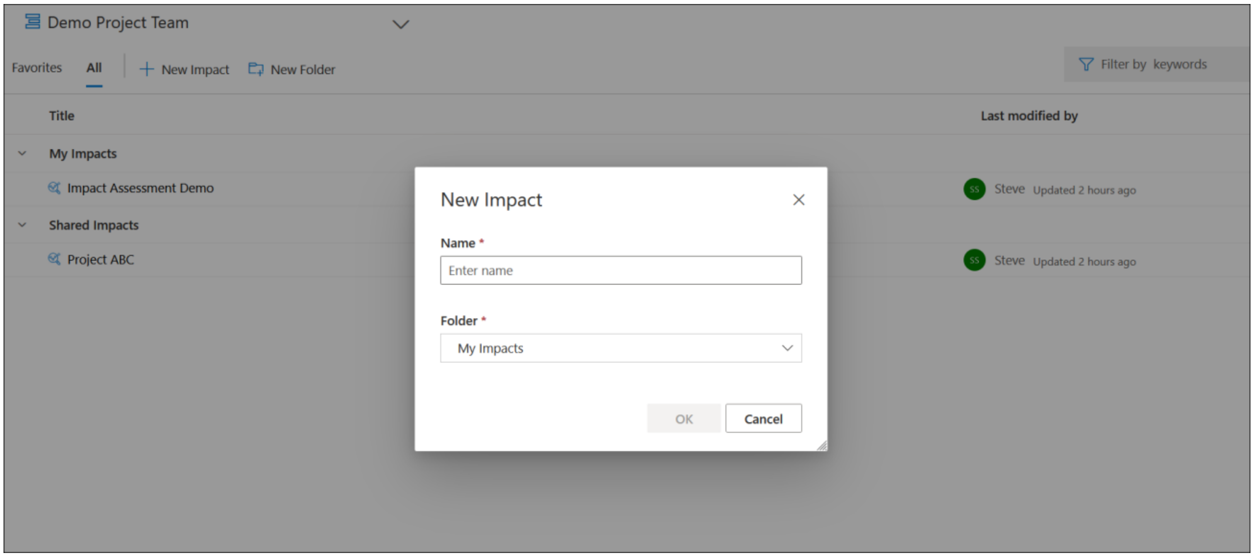
Similar to the Queries module, "**Impact Assessment**" can also be invoked from the **Backlogs**.



Users can select one or multiple work items in Backlogs and then click on "**Impact Assessment**" as shown in the image below.



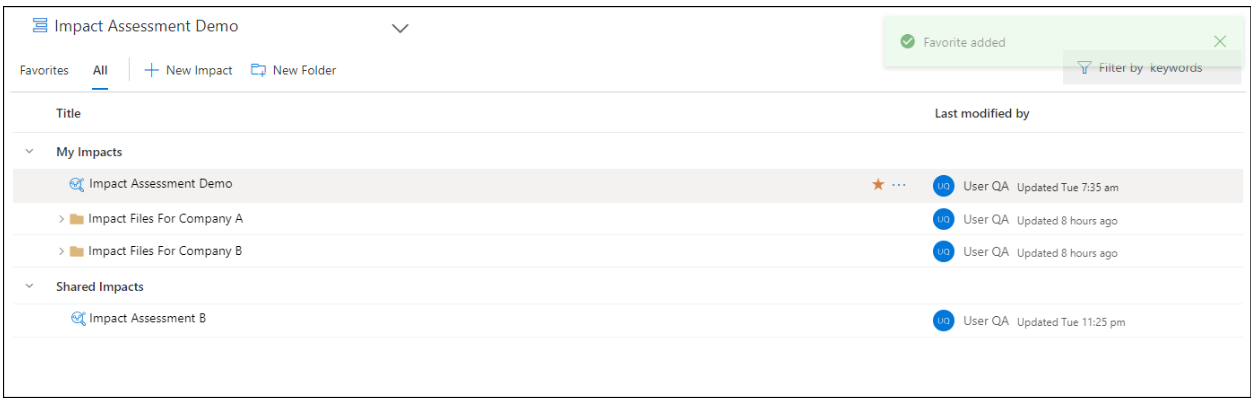
As the "**Impact Assessment**" option is clicked, the user will be navigated to the "**Impact Assessment**" module and the "**New Impact**" window will appear asking to enter the name for the Impact and select its relevant folder.



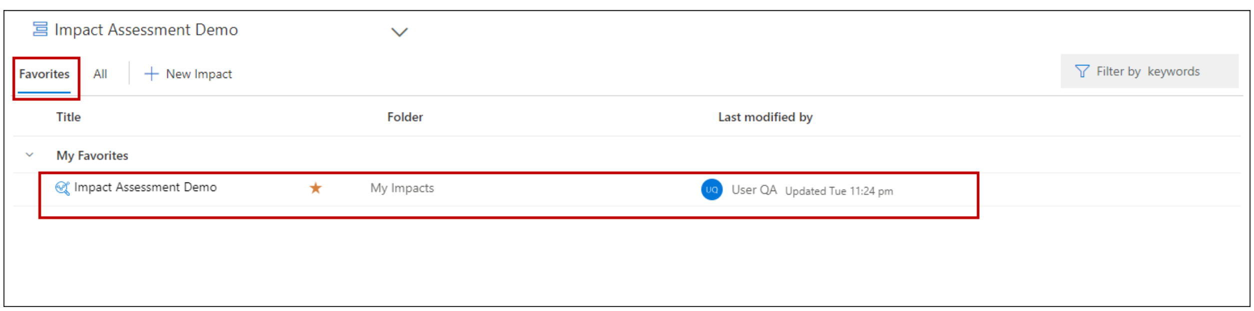
ADD TO FAVORITES

- The user can add-to-favorite any Impact File. Hover on the desired Impact and click on the “☆” icon.

- The desired Impact file has been added to Favorites.

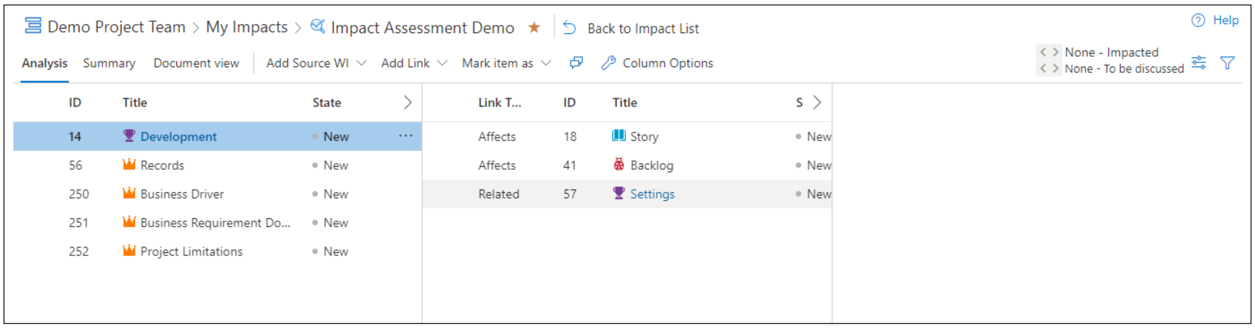


All the “Favorite” Impact Files can be accessed from the “**Favorites**” tab.

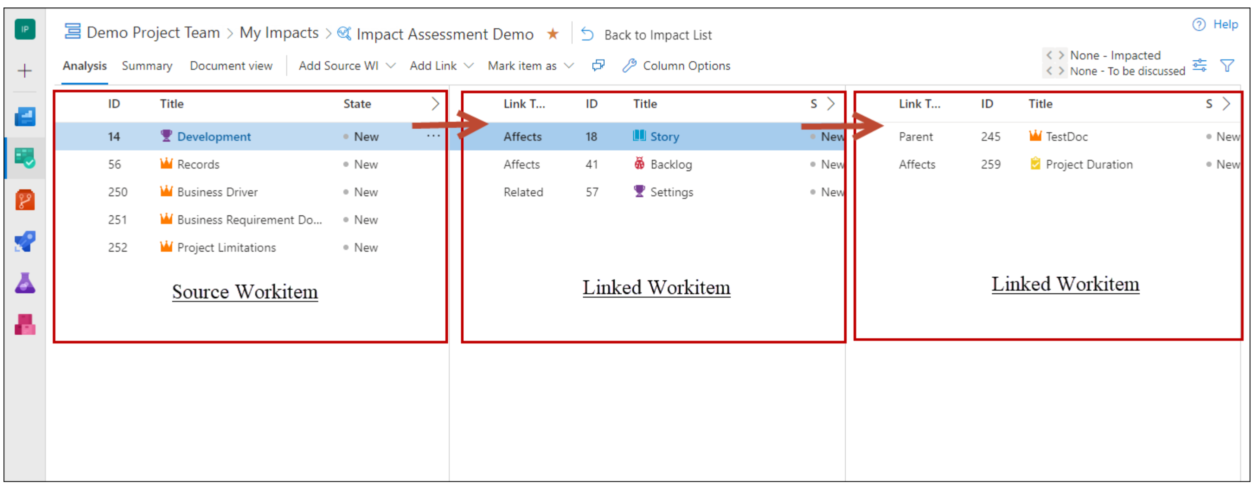


ANALYSIS

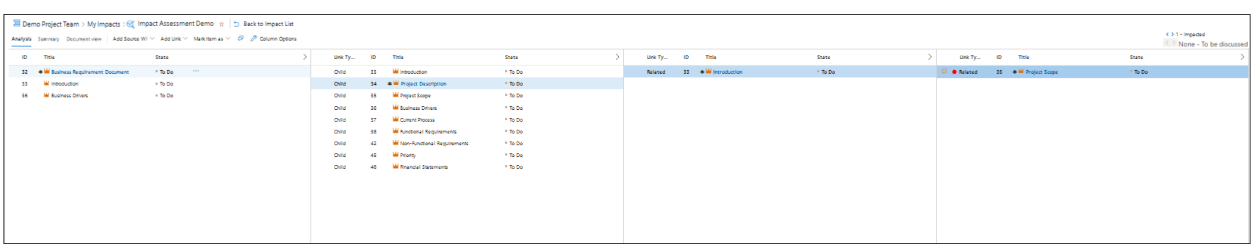
On the Impact Assessment **Analysis** tab, as shown in the image below, two columns are shown by default. The column on the left-hand side entails the source work item(s) on which the Impact Assessment is intended to be performed. The second column in the Analysis window displays the list of all those work items that are directly associated with the source work item through any Link Type.



If any work item of the second column has work item(s) linked to it then, upon clicking the respective work item, the linked work item(s) will reflect in the third column of Impact Assessment.



The **number of columns will increase** with the chain of associated work items as shown in the image below.

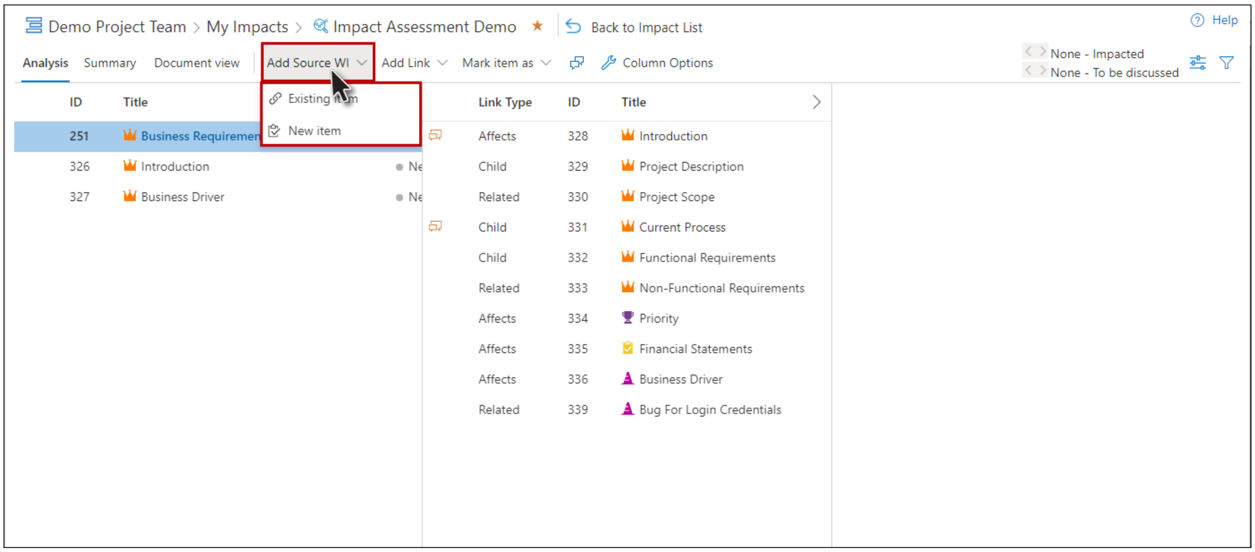


ADD SOURCE WI

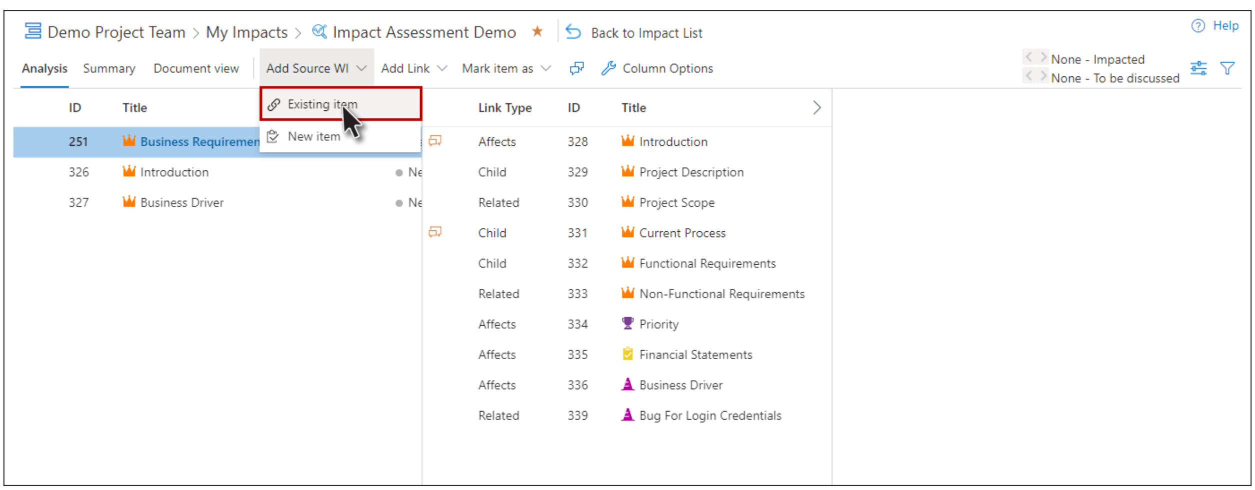
From the Analysis tab, the user has the option to add a source work item using the "**Add Source WI**" option. With the "Add Source WI" option, a user can add an "**Existing Item**" as well as a "**New Item**" to the Source WI column.

ADD AN EXISING ITEM AS SOURCE WI

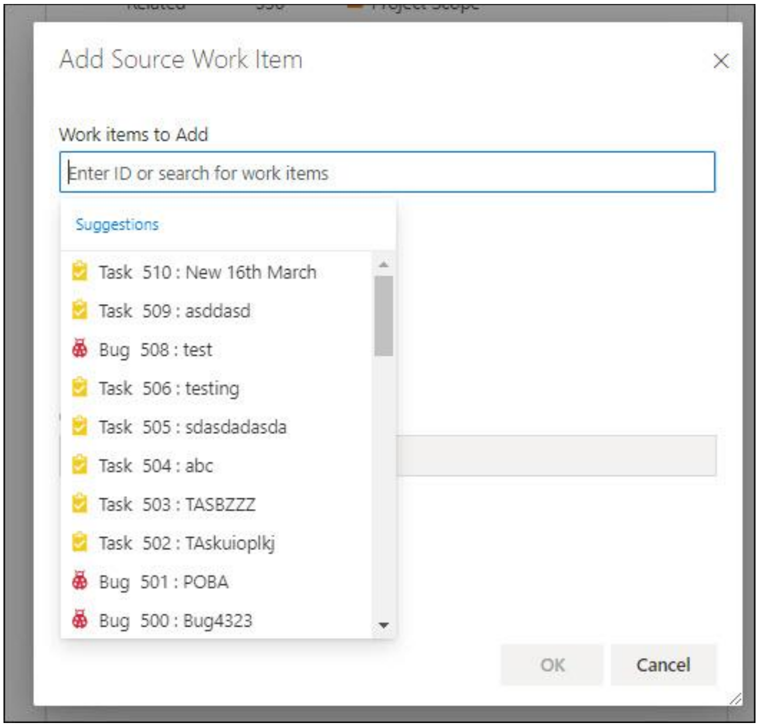
- Click on "**Add Source WI**" as shown in the image below.



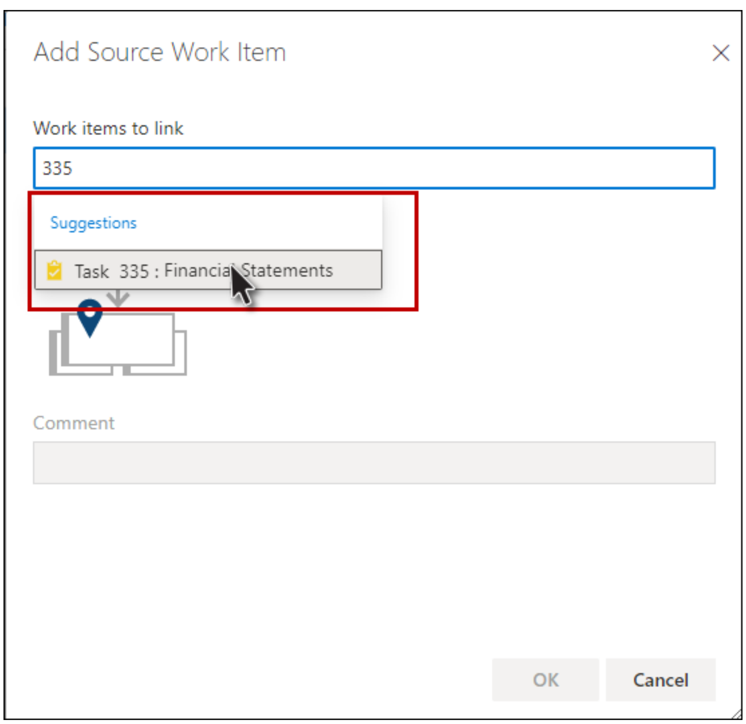
- Click on "**Existing item**" from the dropdown menu.



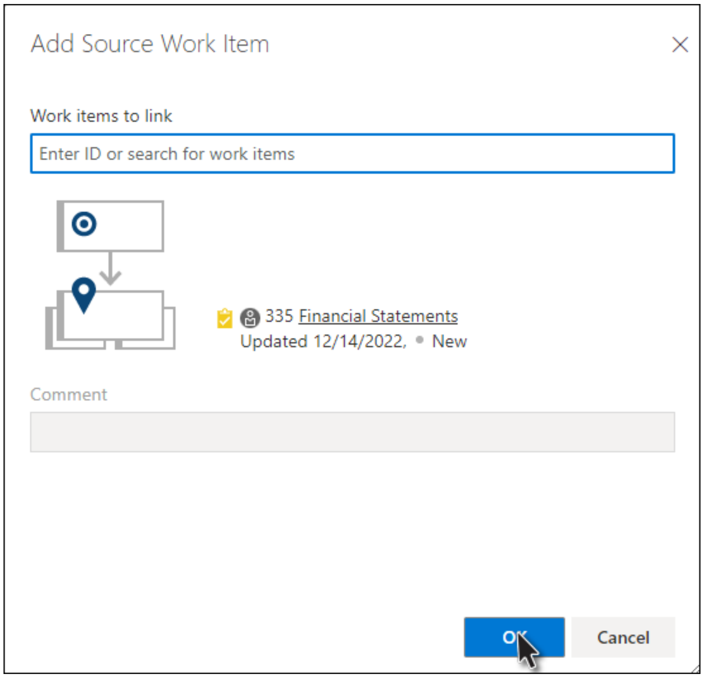
- As the user clicks on the "**Existing Item**" option, the following "**Add Source Work Item**" window will appear. The user can now fetch any existing work item as the Source WI for Impact Assessment.



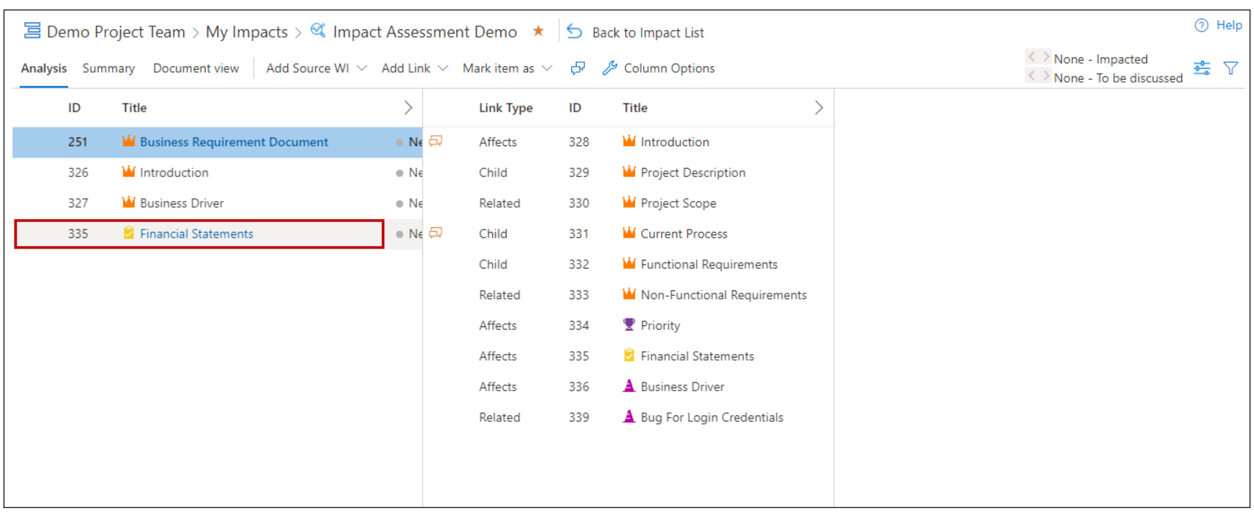
- Now **enter the Work Item ID** or **search by title.**



- Click on the "**OK**" button once you have selected your desired Source WI(s).

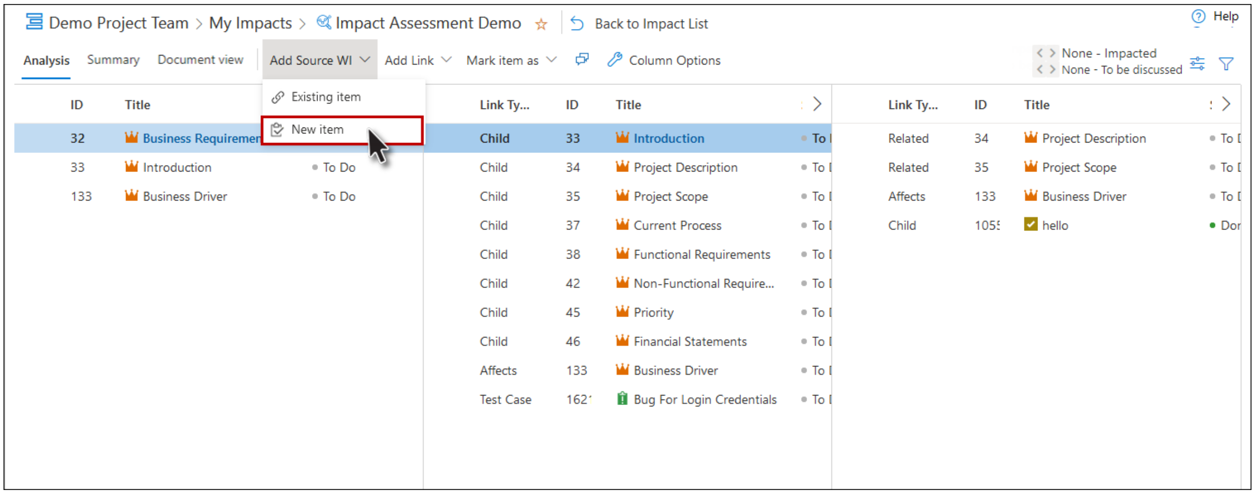


Existing work item has been **added** as a Source WI.

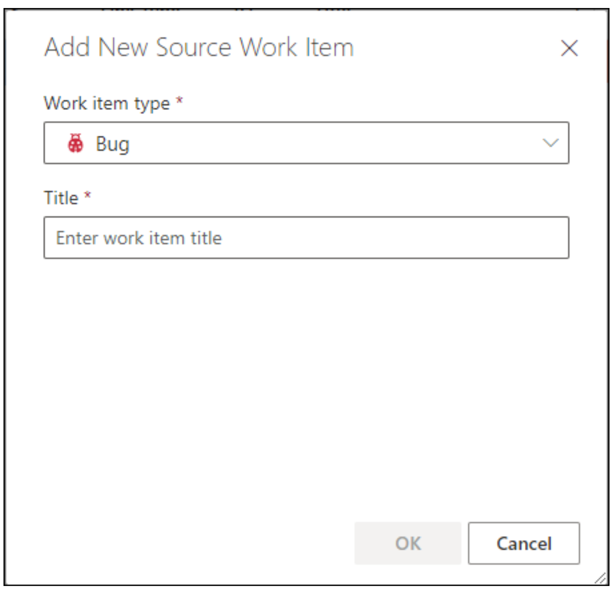


ADD A NEW ITEM AS SOURCE WI

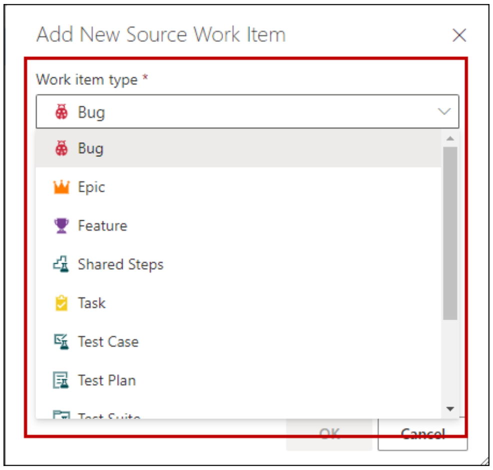
- Click on "**New Item**" option from the "Add Source WI" dropdown.



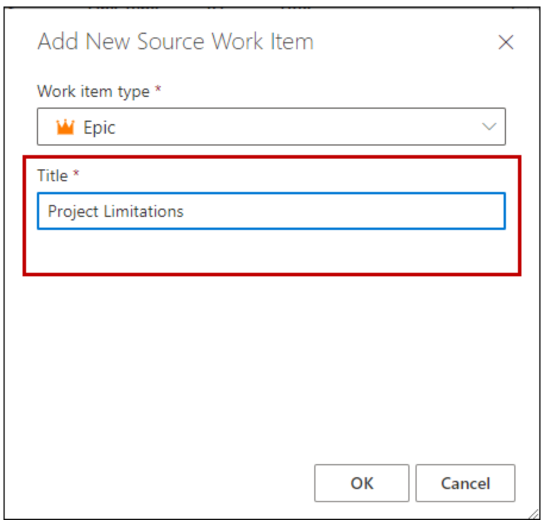
- As the user clicks on "New Item", the following "**Add New Source Work Item**" window appears asking for the desired "**Work Item Type**" and "**Title**" for the "New Item".



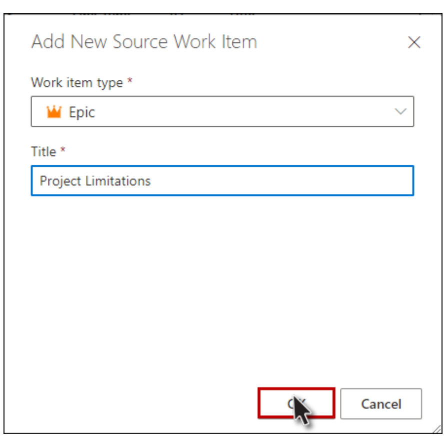
- Select the desired **Work item type**.



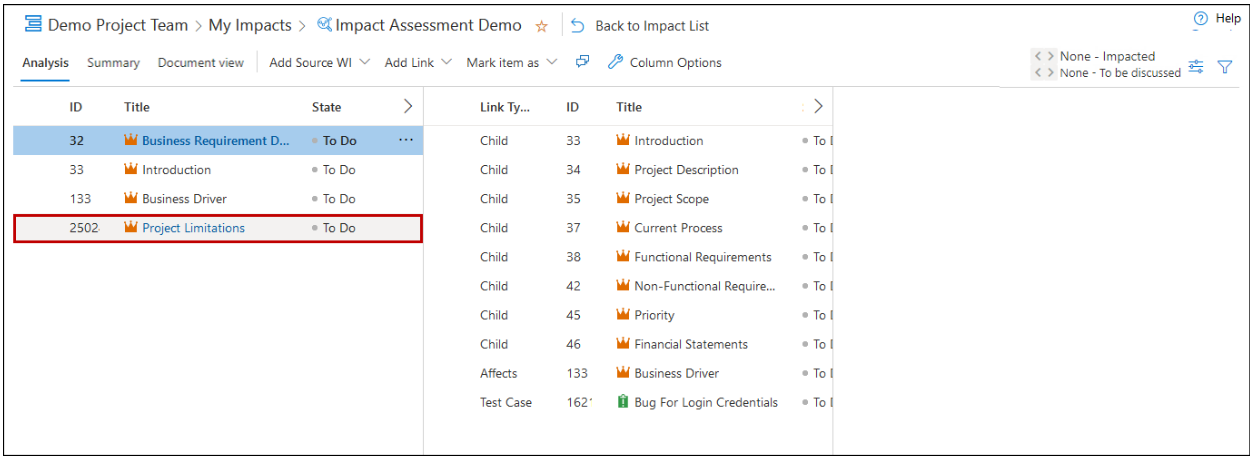
- Enter a suitable **Title** for the new Source WI.



- Click on the "**OK**" button.

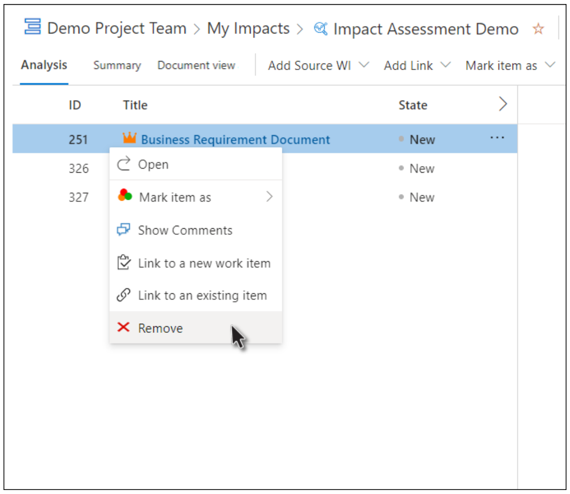


The new item has been **added** as a Source WI of the Impact file.

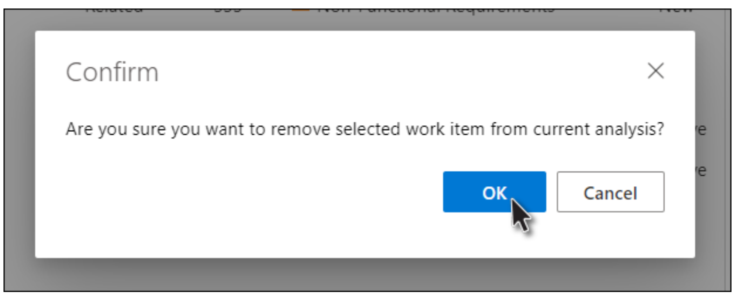


REMOVE A SOURCE WORKITEM

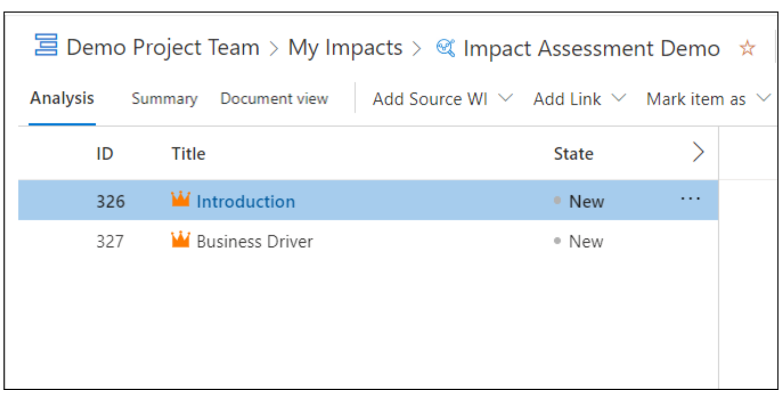
- To remove a source workitem from your Impact file, right click on the desired Source WI and click on the "**Remove**" option in the context menu.



- Click on the "**OK**" button on the confirmation pop up.

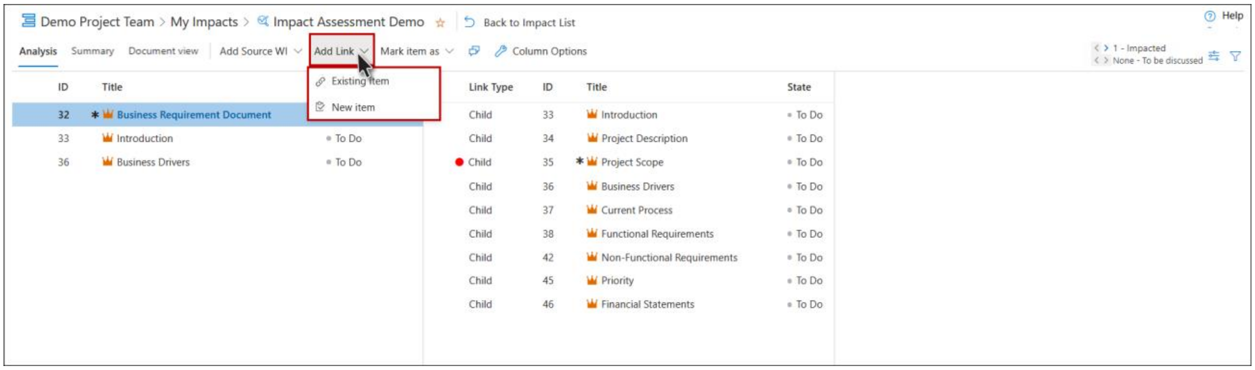


- The selected Source WI has been **removed** successfully.



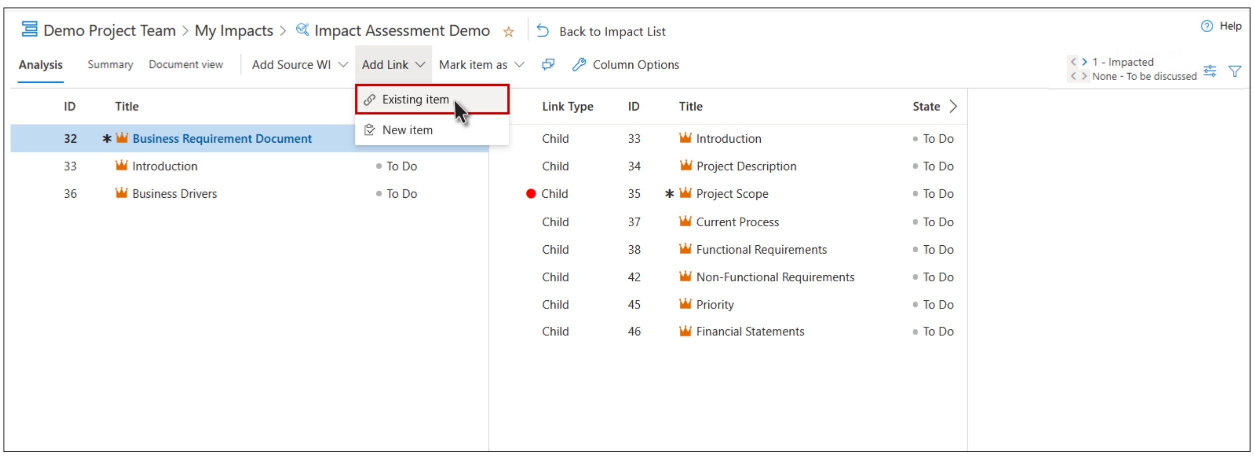
ADD LINK

With the **Add Link** users can add an existing or new work item(s) during Impact Assessment. The link will be added against the selected work item.

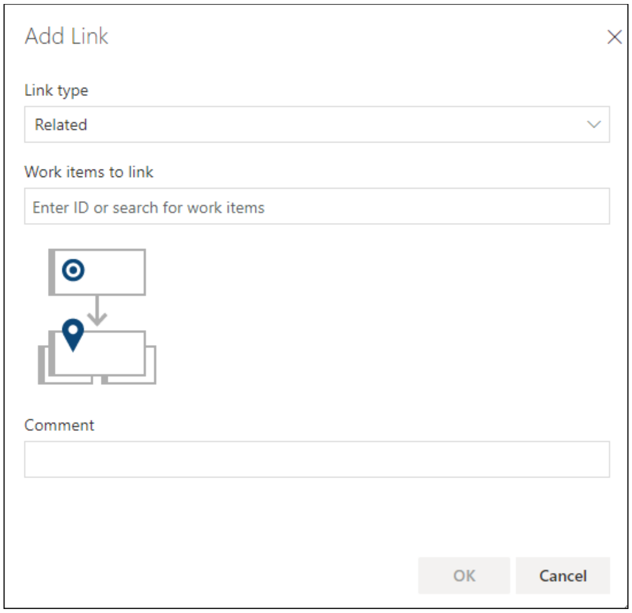


ADD AN EXISTING ITEM

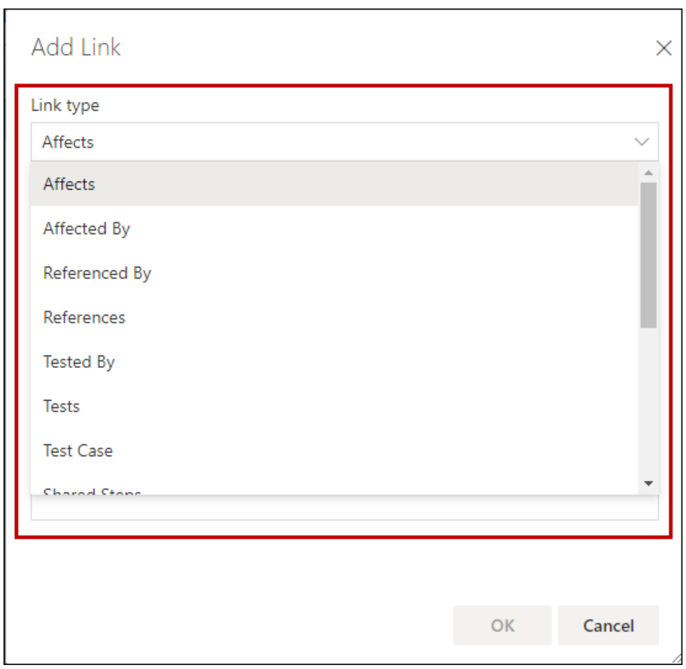
- Once you have selected the desired work item, click on the **Add Link** option, and select "**Existing Item.**"



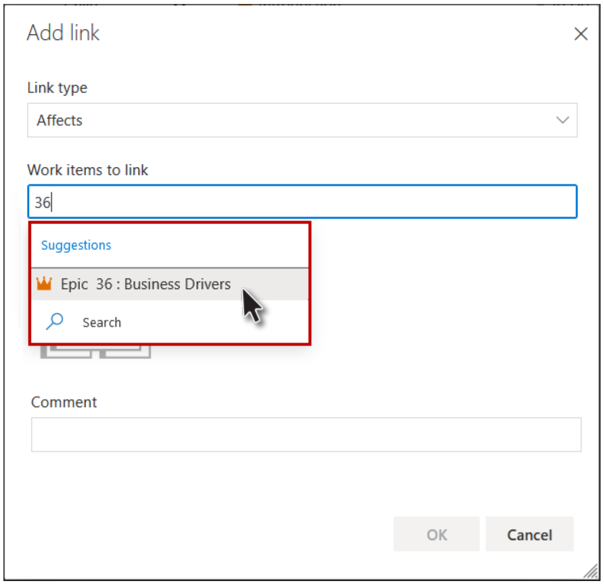
- As you click on the "**Existing Item**" option, the following "**Add Link**" window will appear. The user can now link an existing work item(s) from within the ADO server to the work item.



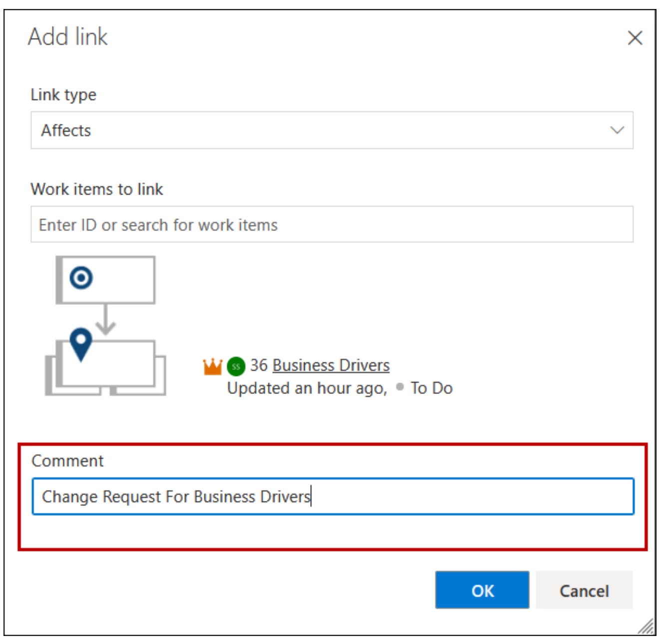
- Select the Existing Work item(s) **Link Type.**



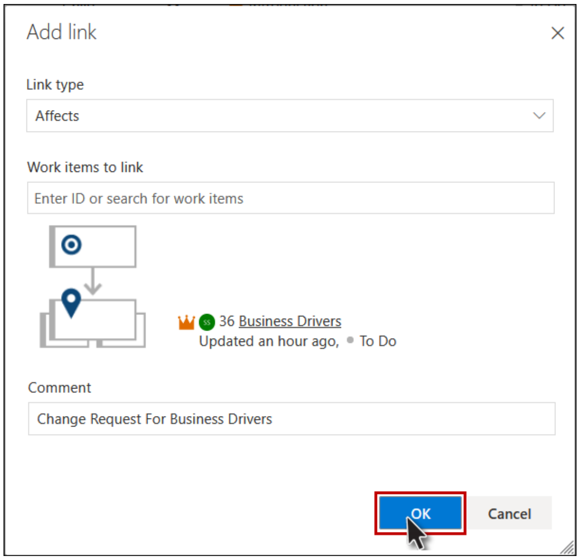
- Now **enter the Work Item ID** or **search by title.** While the user is entering the text, the system will start displaying suggestions/results that match the work item type or title of the work item.



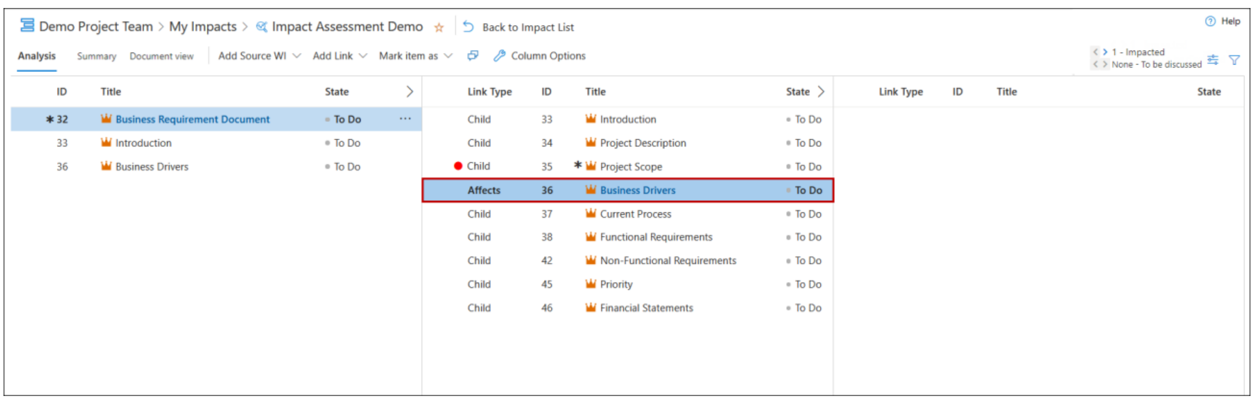
- The user can also add **comments** while adding an existing work item. Added comments will only be visible in **Links** tab of ADO work item editor.



- Now Click on the **OK** button.

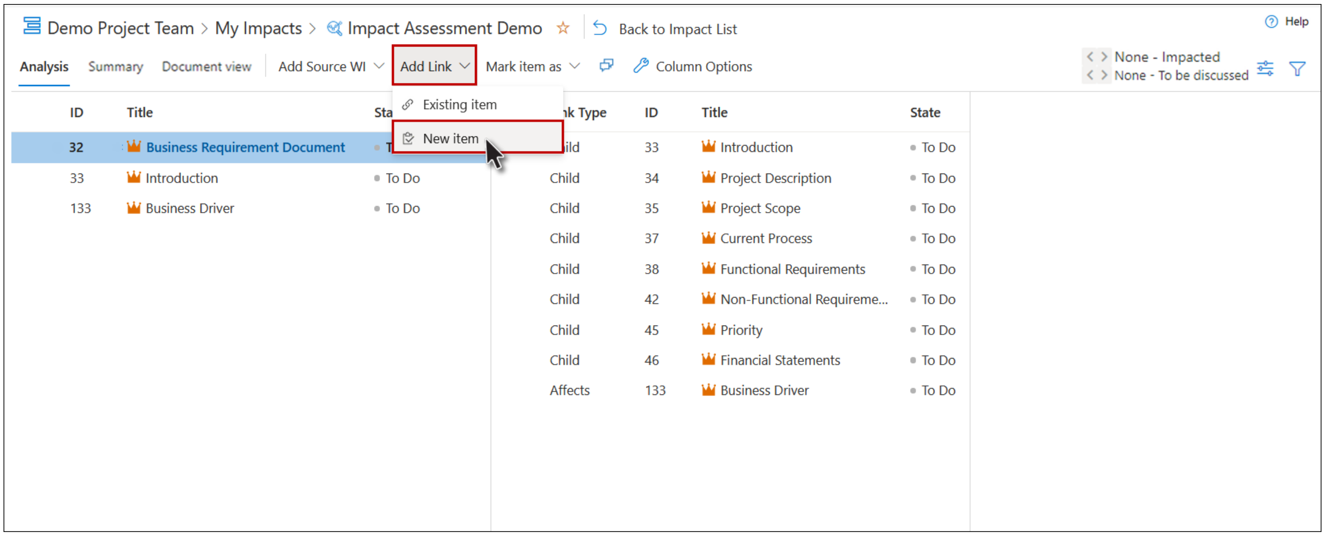


The Existing work item has been **added** as a link against the selected work item.

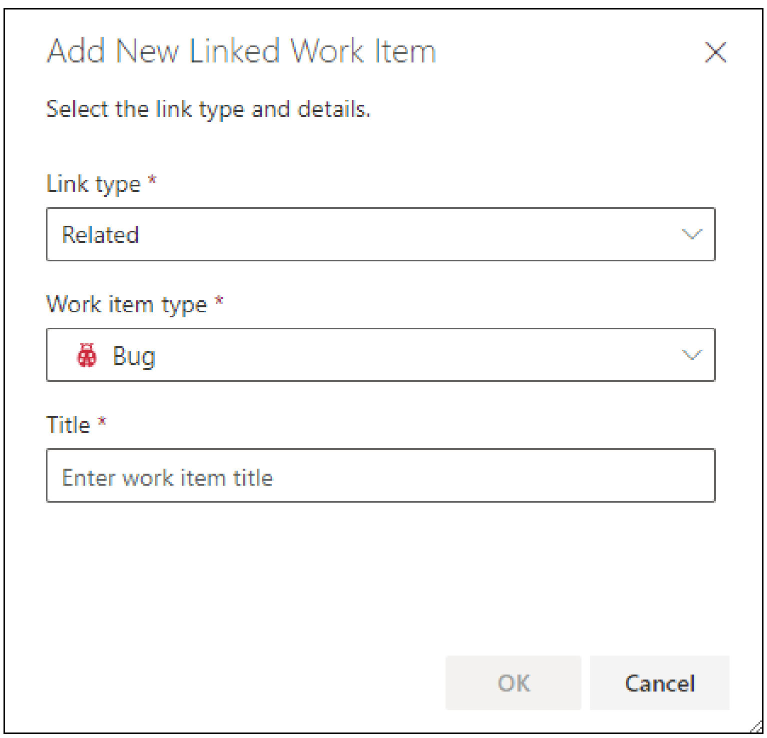


ADD NEW ITEM

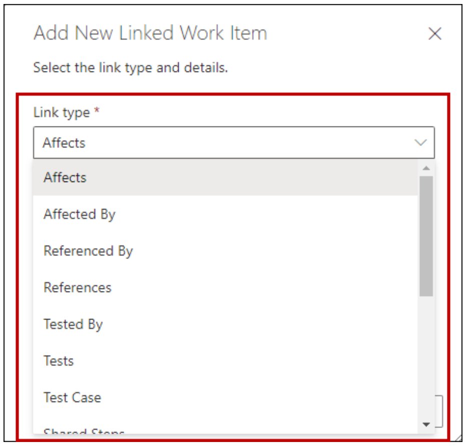
- Select the desired work item, click on the **Add Link** option, and select "**New Item**"



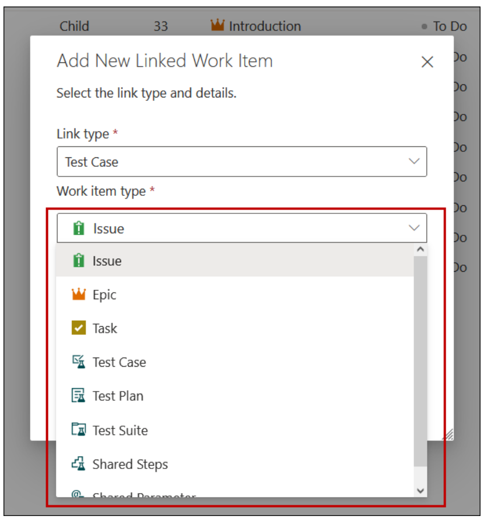
- As the user clicks on "**New Item**", the following "**Add New Linked Work Item"** window appears with the relevant options**.**



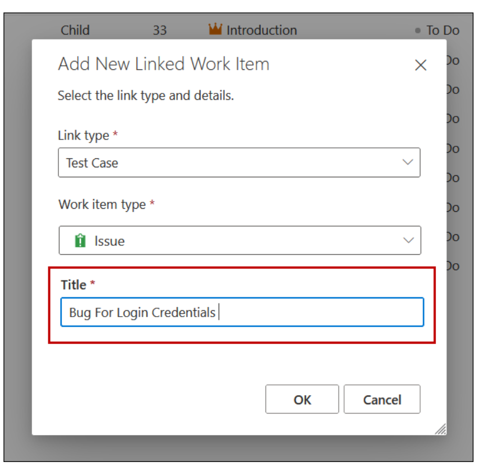
- Select the **desired link type** for the new work item.



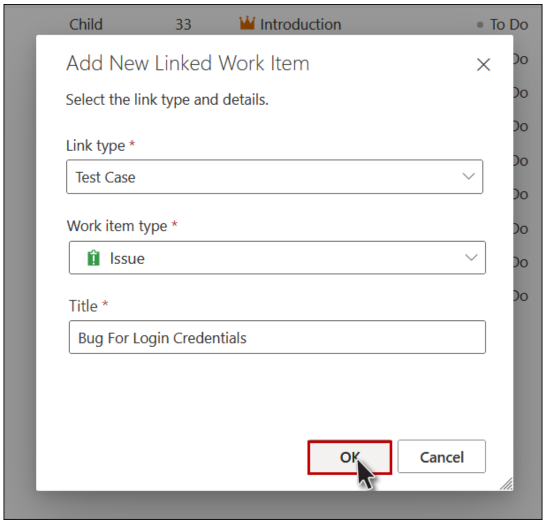
- Select the desired **work item type.**



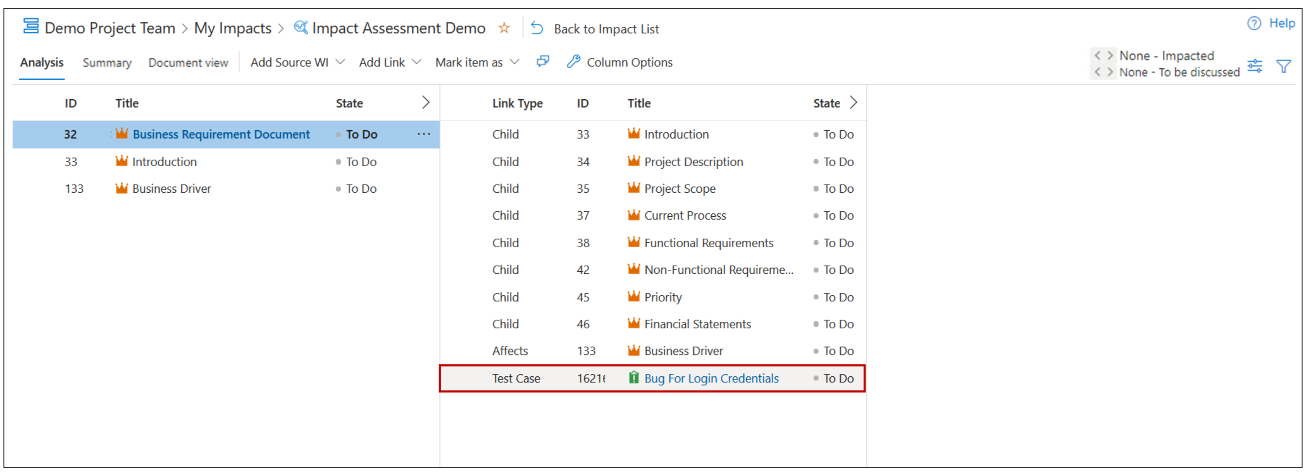
- Enter **title** for the new work item.



- Now click on the "**OK**" button.

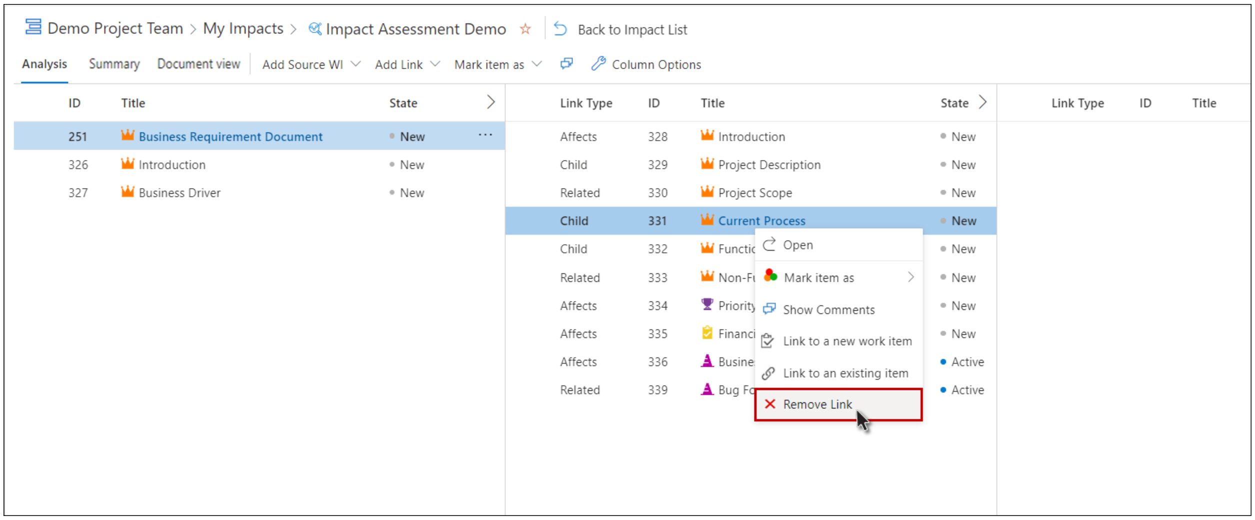


The new work item has been **added** as a link against the selected work item.

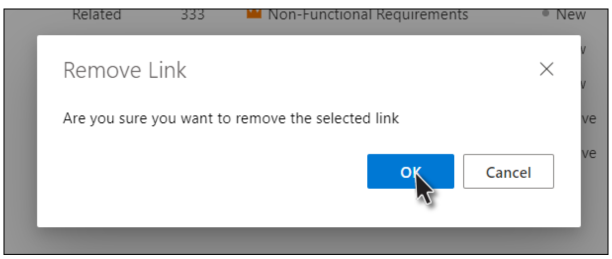


REMOVE A LINK

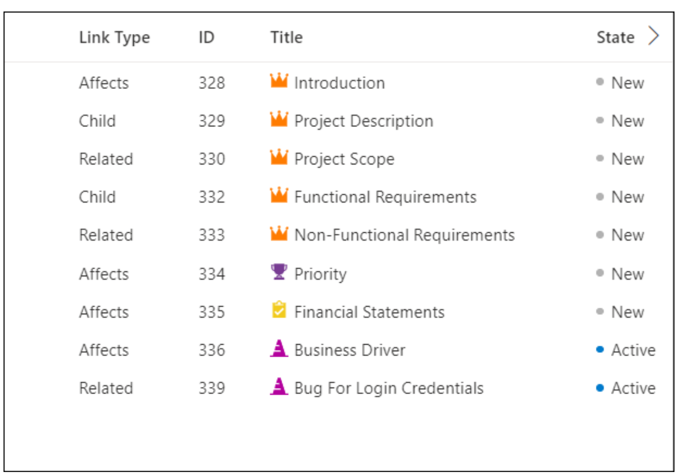
- To remove a link from your Impact file, right click on the desired link and click on the "**Remove Link**" option in the context menu.



- Click on the "**OK**" button on the confirmation pop up.



- The selected link work item has been successfully **removed**.



Link Type	ID	Title	State
Affects	328	Introduction	New
Child	329	Project Description	New
Related	330	Project Scope	New
Child	332	Functional Requirements	New
Related	333	Non-Functional Requirements	New
Affects	334	Priority	New
Affects	335	Financial Statements	New
Affects	336	Business Driver	Active
Related	339	Bug For Login Credentials	Active

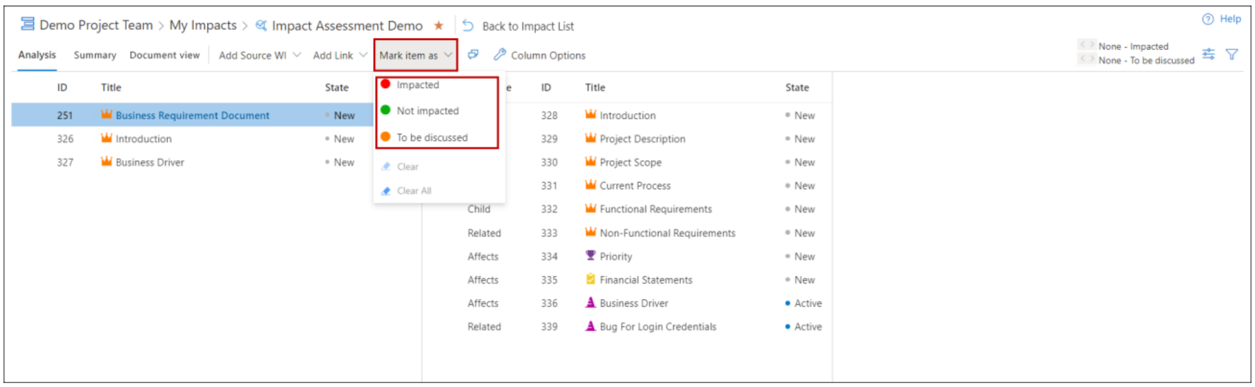
MARK ITEM AS IMPACTED, NOT IMPACTED, TO BE DISCUSSED

While doing the Impact Assessment users can mark any work item as **Impacted**, **Not Impacted**, or **To be Discussed** using two methods as show below:

Note: Marking work items with any of the statuses would lead to the “**Add Comments**” option.

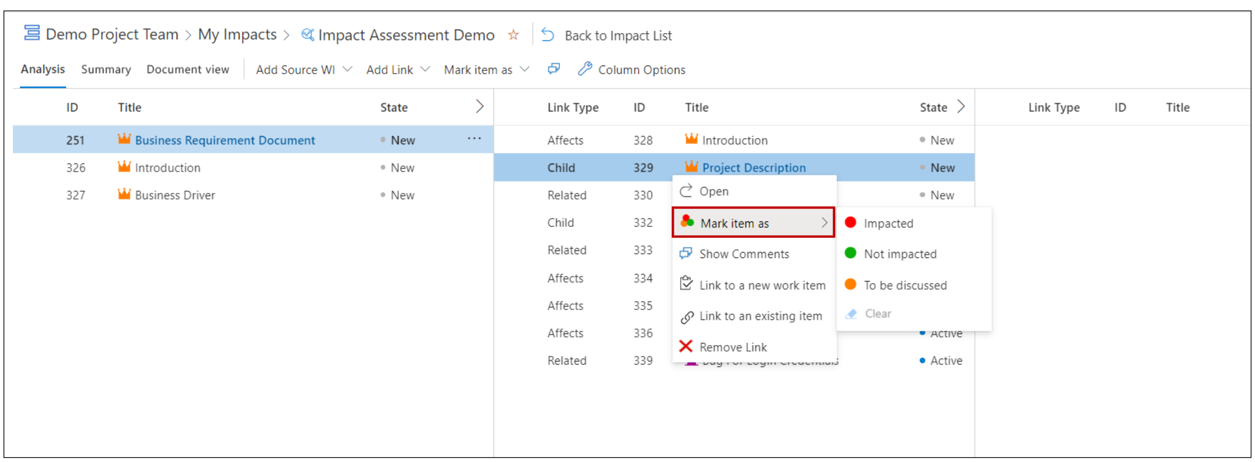
MARKING ITEMS FROM THE TOOLBAR

- Select a workitem and go to the “**Mark item as**” option in the Impact Assessment toolbar. From the dropdown menu select your desired Impact for the workitem.

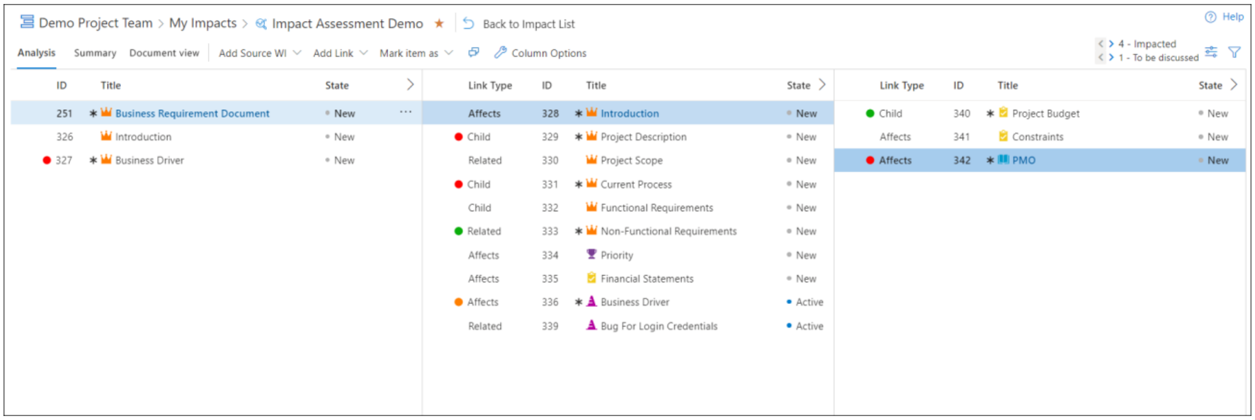


MARKING ITEMS FROM THE CONTEXT MENU

- Right click on the desired workitem and hover your mouse on the “**Mark item as**” option in the context menu. Now select your desired Impact for the WI.



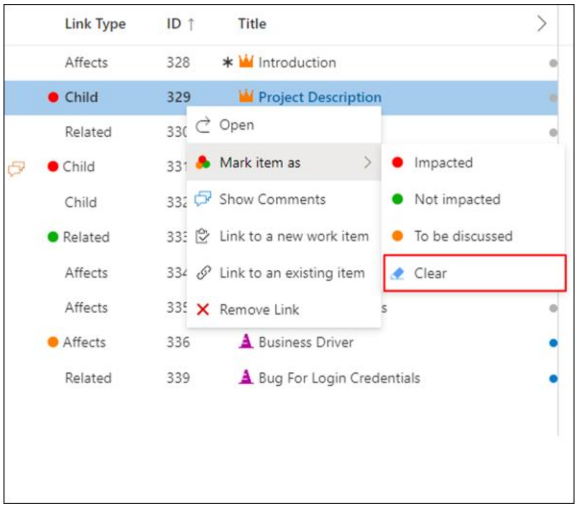
- Workitems have been marked with the desired Impacts using the two above methods.



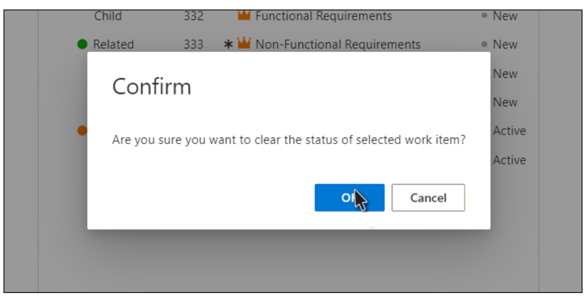
CLEAR A MARKED IMPACT OR IMPACTS

CLEAR A PARTICULAR WORKITEM

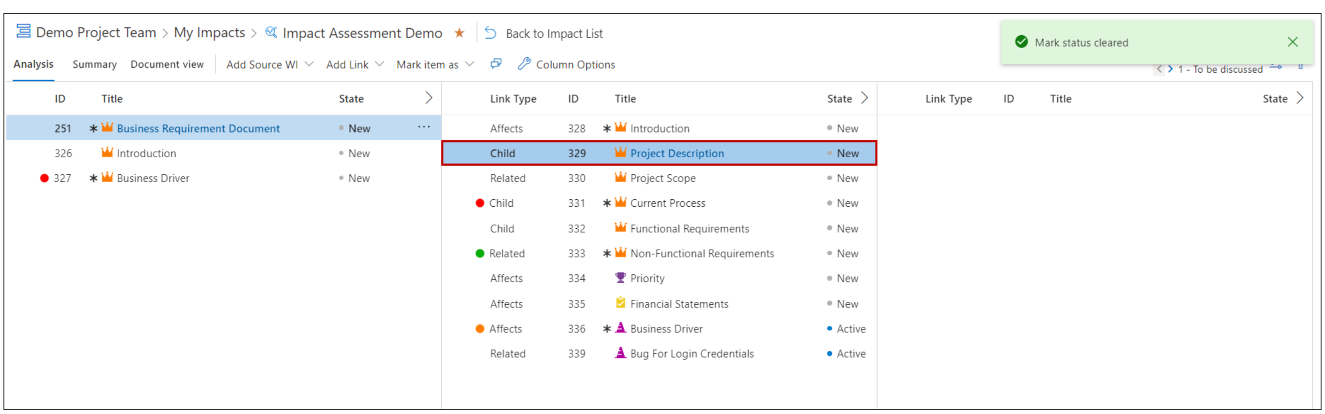
- If the user wants to clear a particular workitem, either source or link workitem, of any marked Impact, he/she may do so with a right click on the respective workitem, hovering onto "Mark item as" in the context menu, and then clicking on the "**Clear**" option.



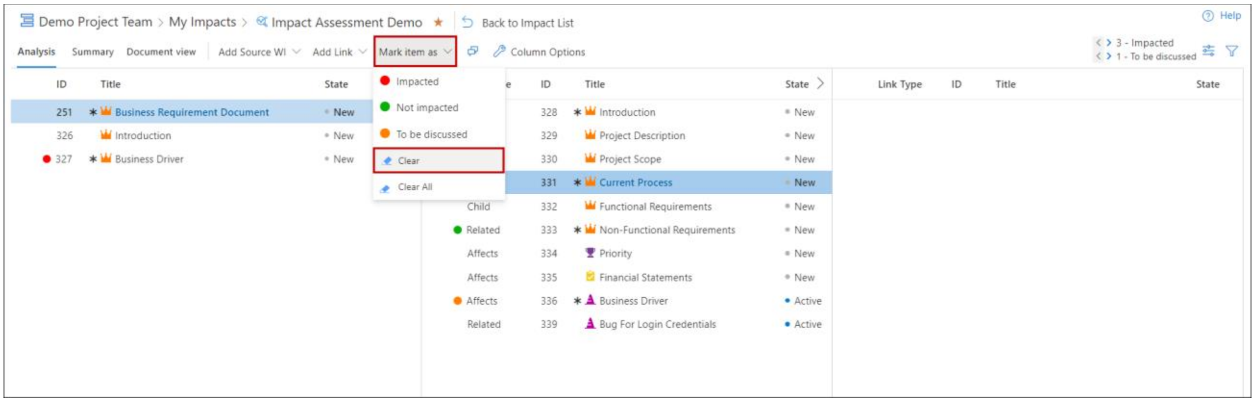
- Click on the "**Ok**" button for confirmation.



The Impact has been successfully removed from the desired workitem.

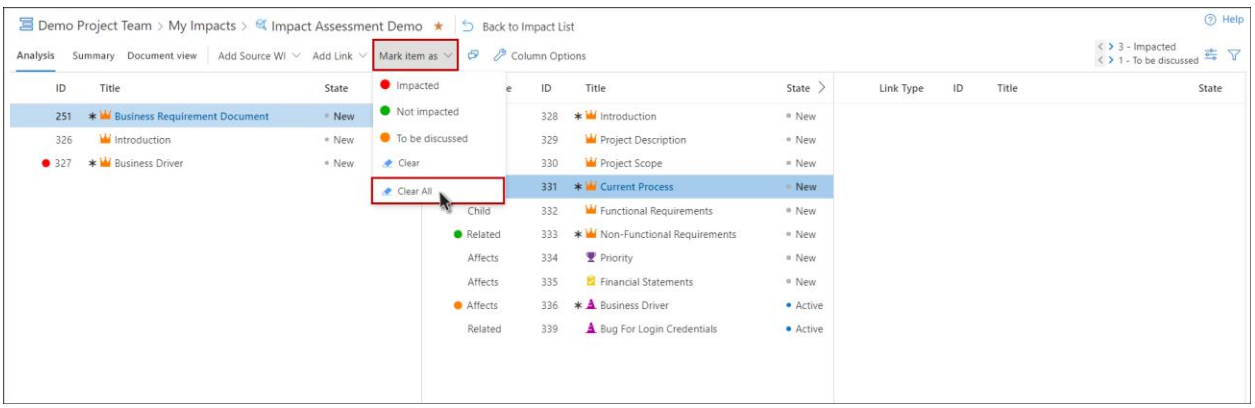


- The same functionality can be utilized by the user from the Impact Assessment toolbar by going to the "**Mark item as**" option and clicking on the "**Clear**" option.

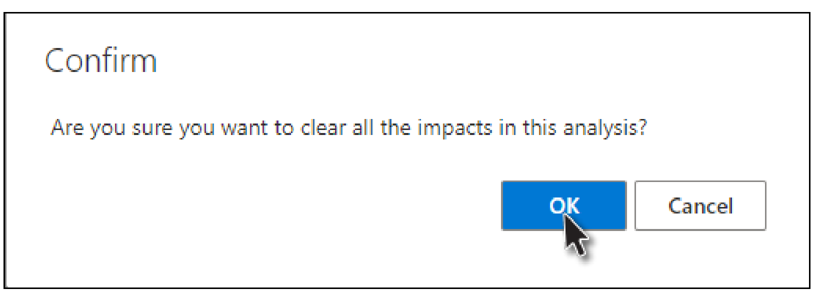


CLEAR ALL THE IMPACTS

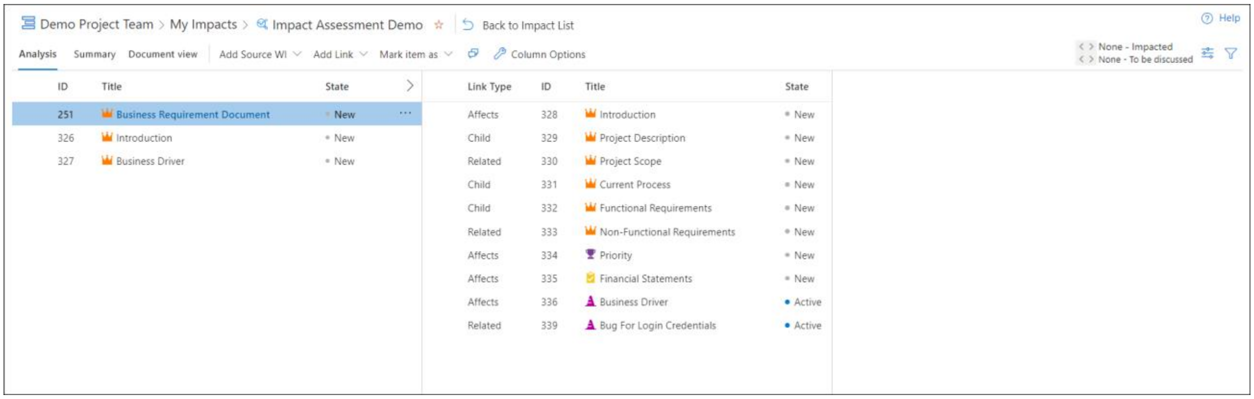
- To clear all the marked workitems in the Impact file, go to "**Mark item as**" in the toolbar, and click on the "**Clear All**" option from the dropdown menu.



- Click on the "**OK**" button in the confirmation pop up.

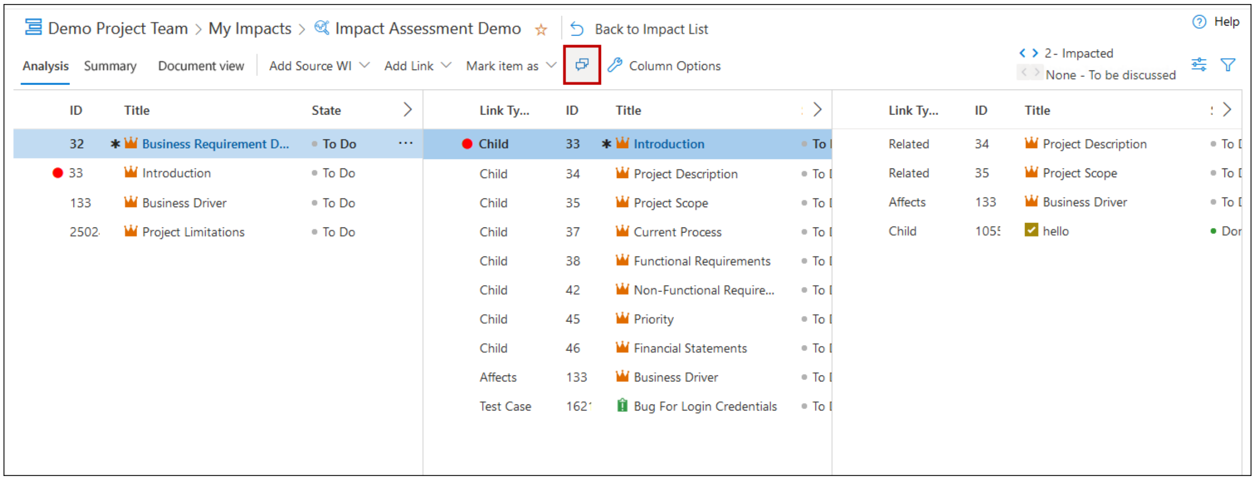


- All the marked Impacts have now been cleared in one go.

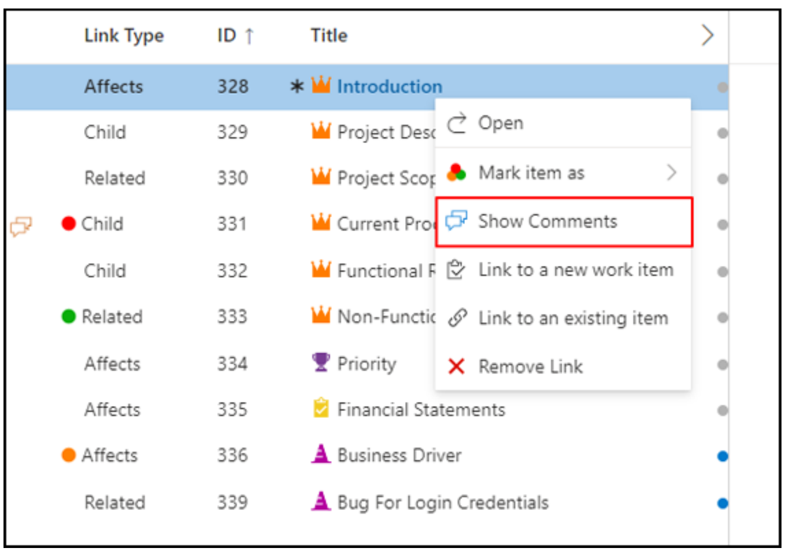


ADD COMMENTS

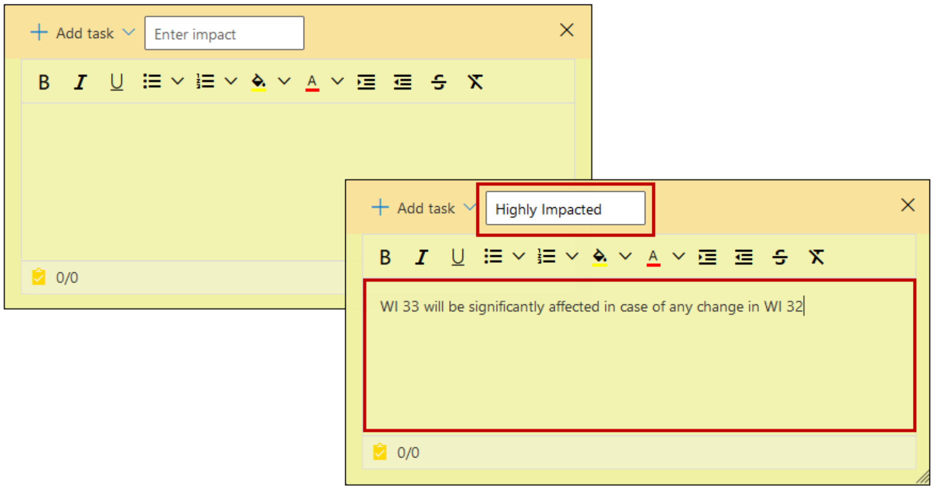
With the "**Add Comments**" option, a user has a slew of options while performing Impact Assessment. The user can enter the Impact, add comments, and add any existing or new task resulting out of the Impact from within the Add Comments window.



The comment window can also be invoked from the context menu for any work item as shown in the image below.



When a user clicks on the "**Add Comments**" icon or marks any work item, the “Add Comments” window provides the user a one-liner description area which may be utilized as deemed suitable.

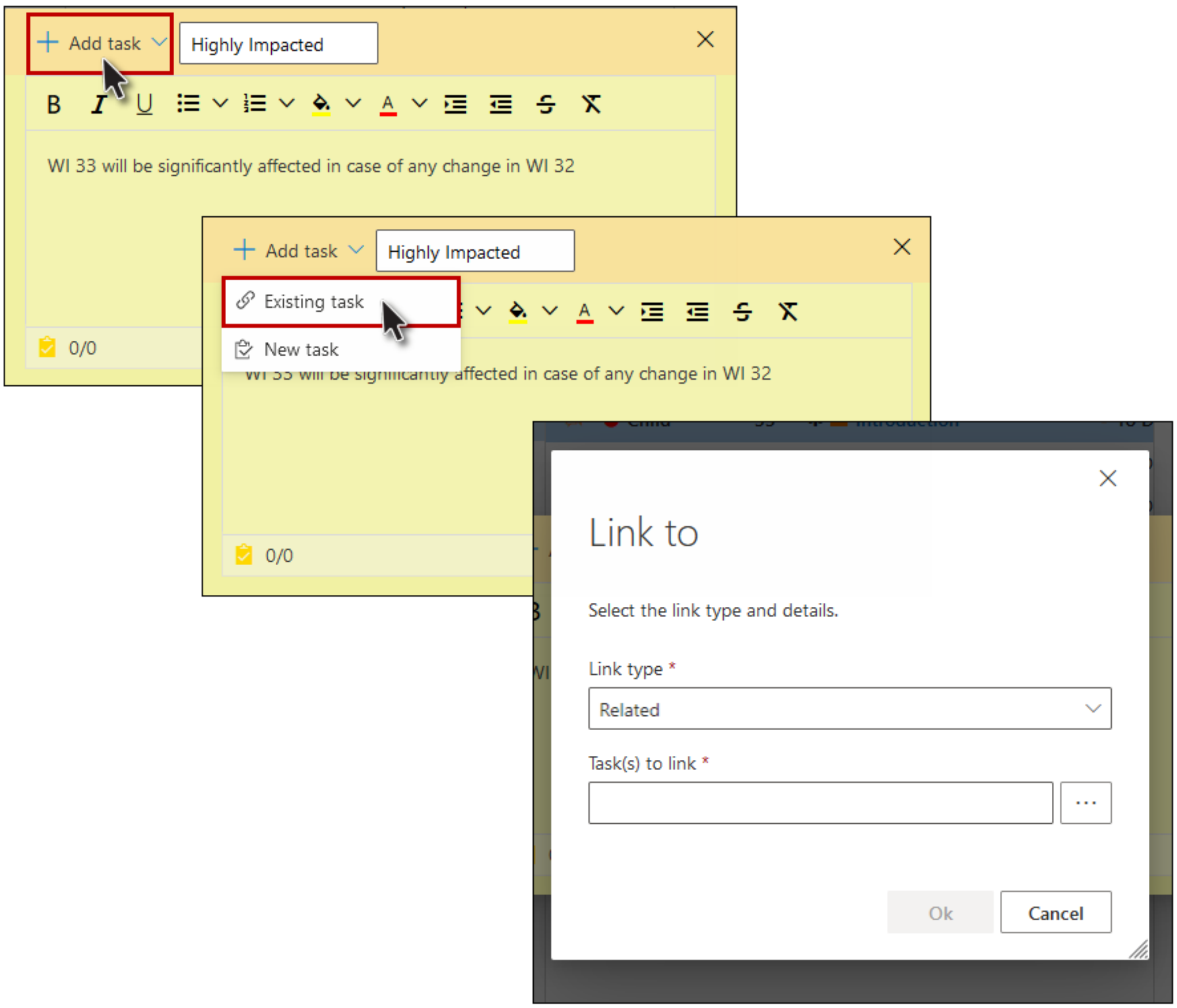


ADD TASK

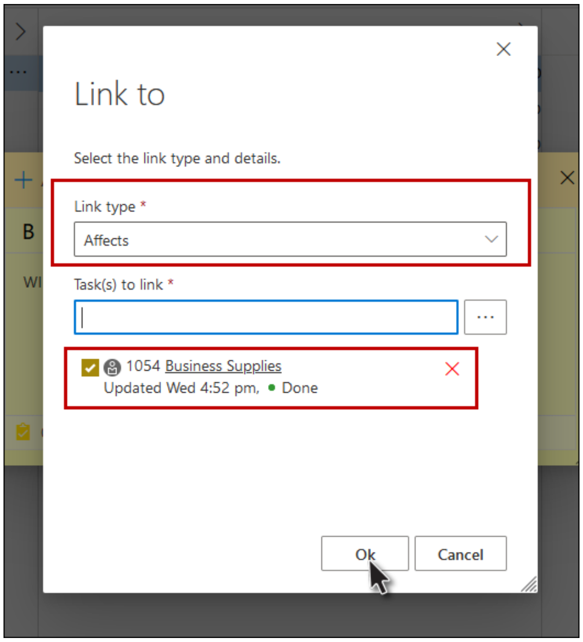
If an Impact necessitates the addition of any further task(s) to perform, the user can click on the **Add Task** option in the **Add Comments** window and utilize any or both of the options, **Existing Task** and **New Task**, as required.

ADD AN EXISTING TASK

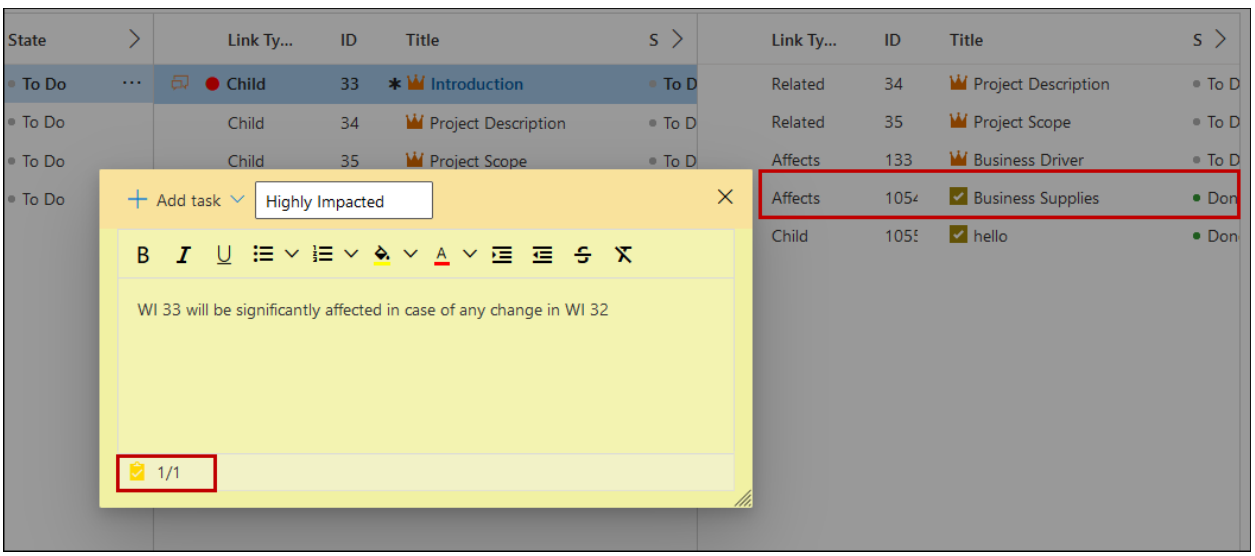
To add an **existing task** against the work item, click on the **Add Task** option in the top left corner of the window and then select "**Existing task**". Once you have clicked on it, enter the link type and select the task(s) to link.



Click on the **"OK"** button once you have selected the Link Type and Task(s) to Link.

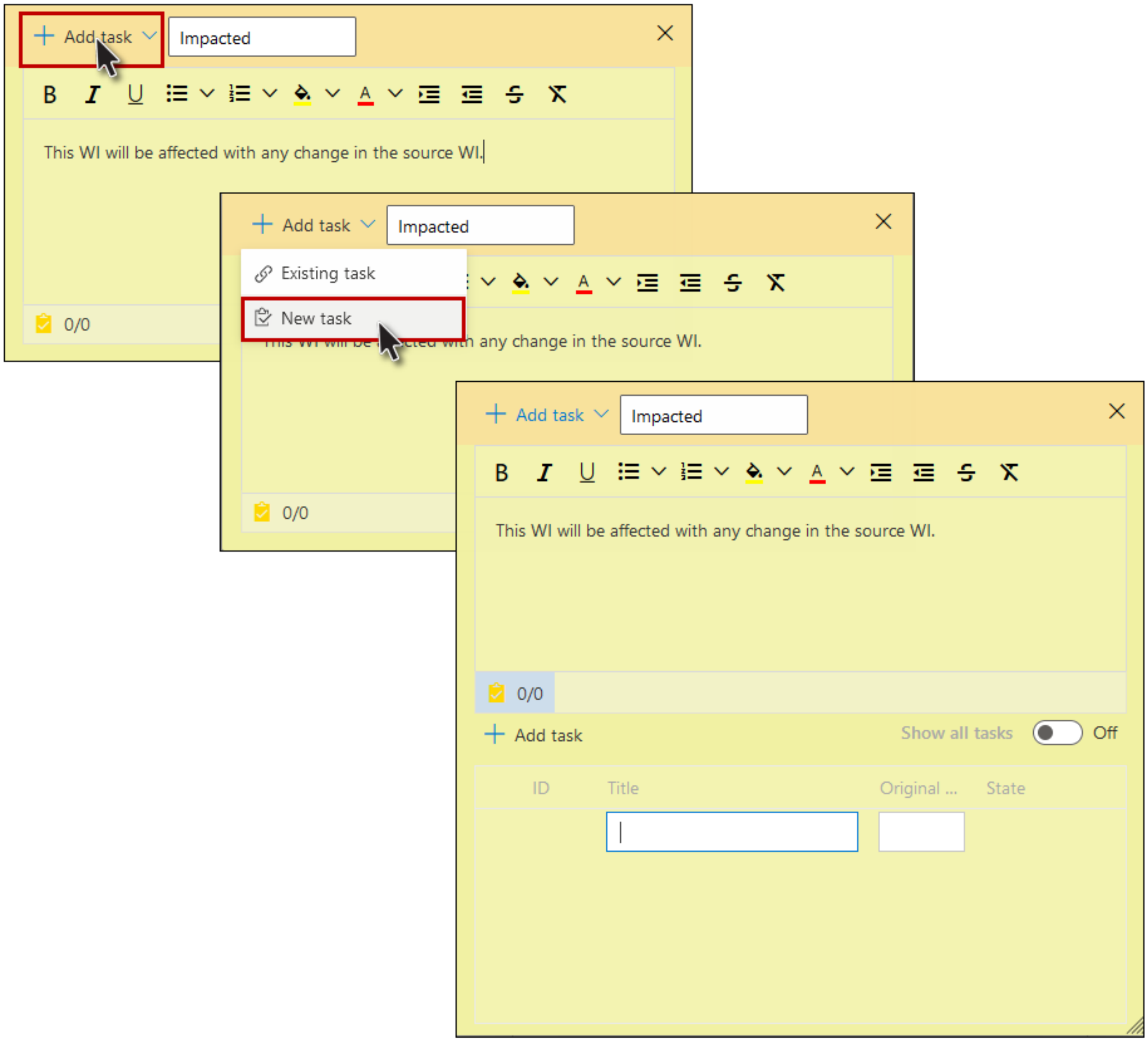


The **existing work item** has now been added as a linked work item.

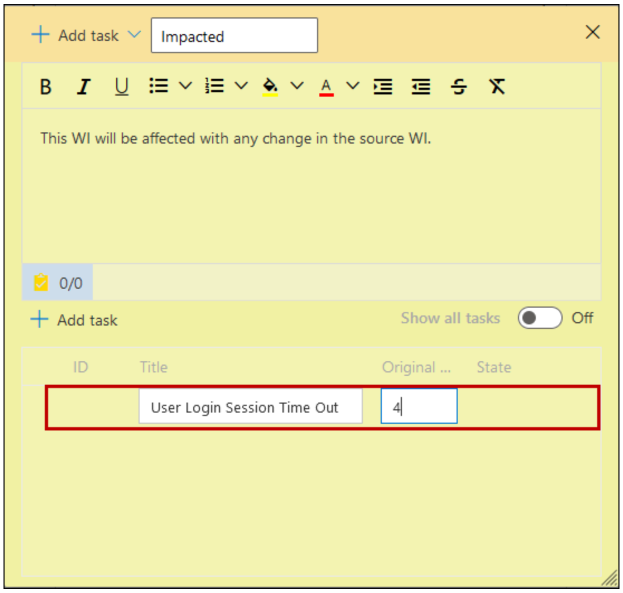


ADD A NEW TASK

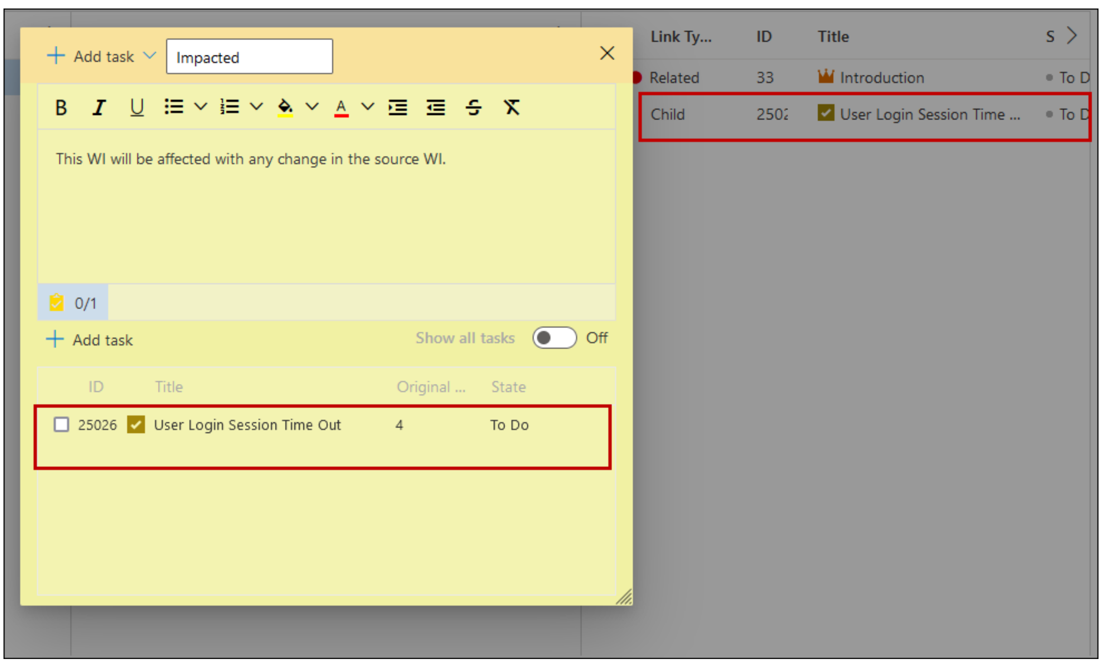
- To add a **New Task** against the work item, click on the **Add Task** option in the top left corner of the window and then select "**New Task**". As the user clicks on the "**New Task**" option, the comments window expands with the option of adding new tasks real-time.



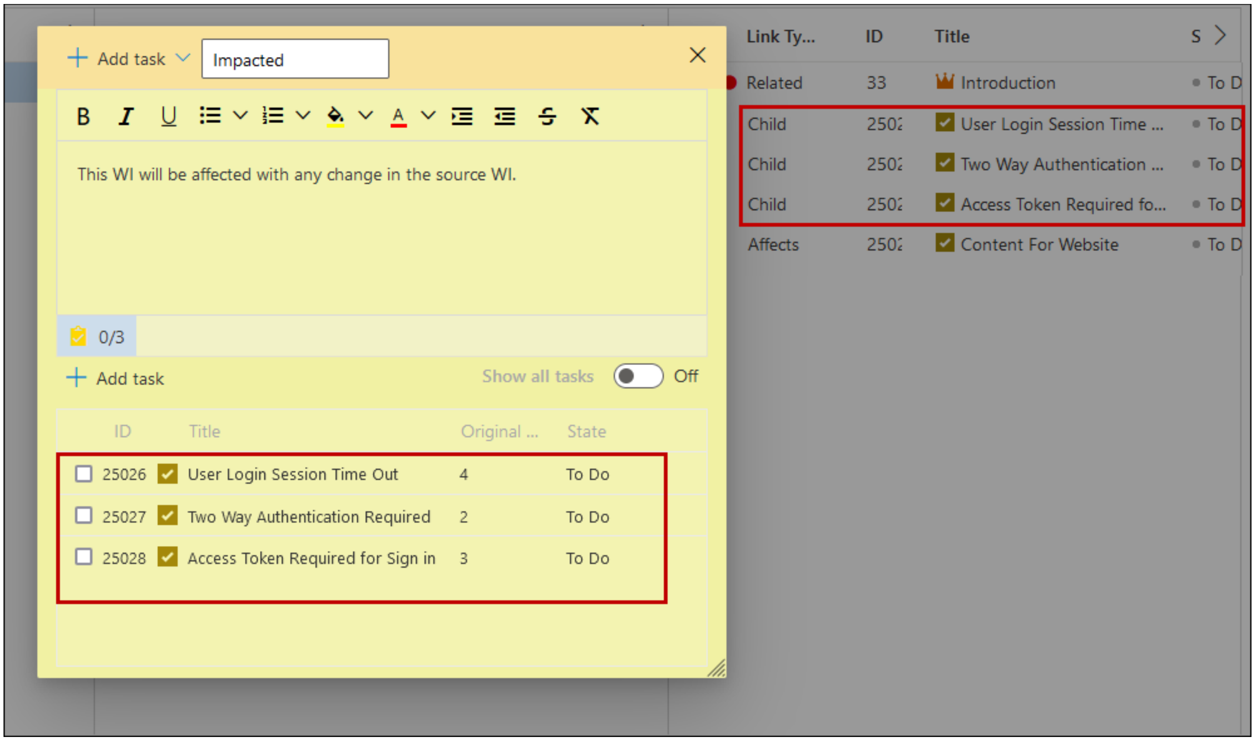
- Enter a **title** for the new task and provide a value for the "**Original Estimate**".



- As the user presses the **Enter** button or **clicks anywhere** in the **Add Comments** window, the **New Task** will be added as a linked work item.

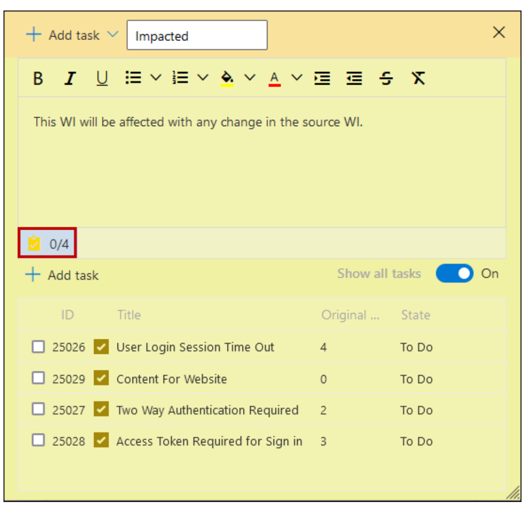


- The user can create **multiple New Tasks** in the same manner and each task will be added as a **Linked Work Item**, as shown in the image below.

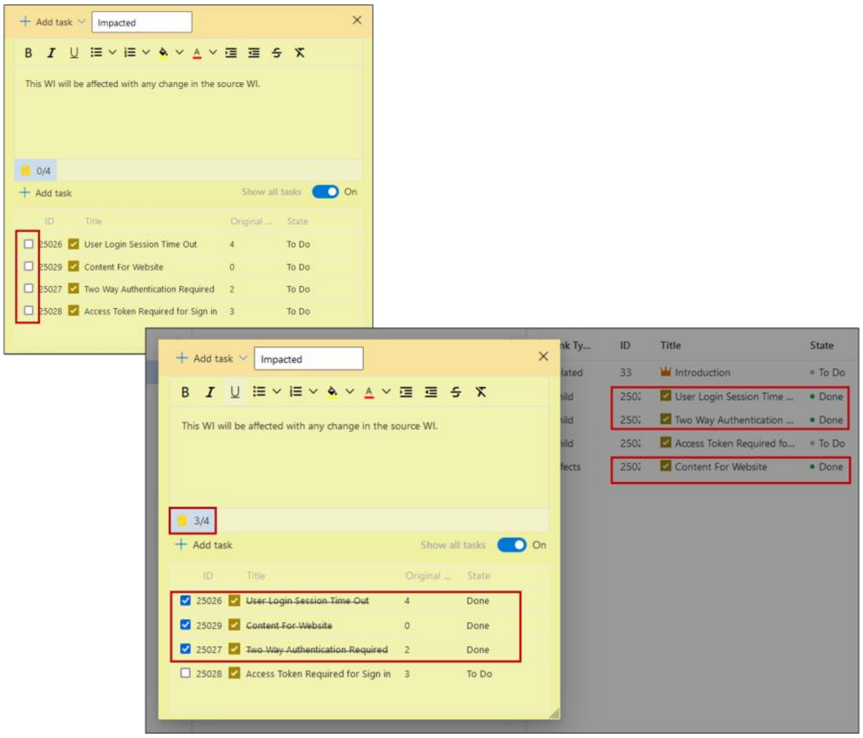


The highlighted section in the below image denotes **Total Number of Closed Tasks** out of **Total Number of Proposed Tasks.**

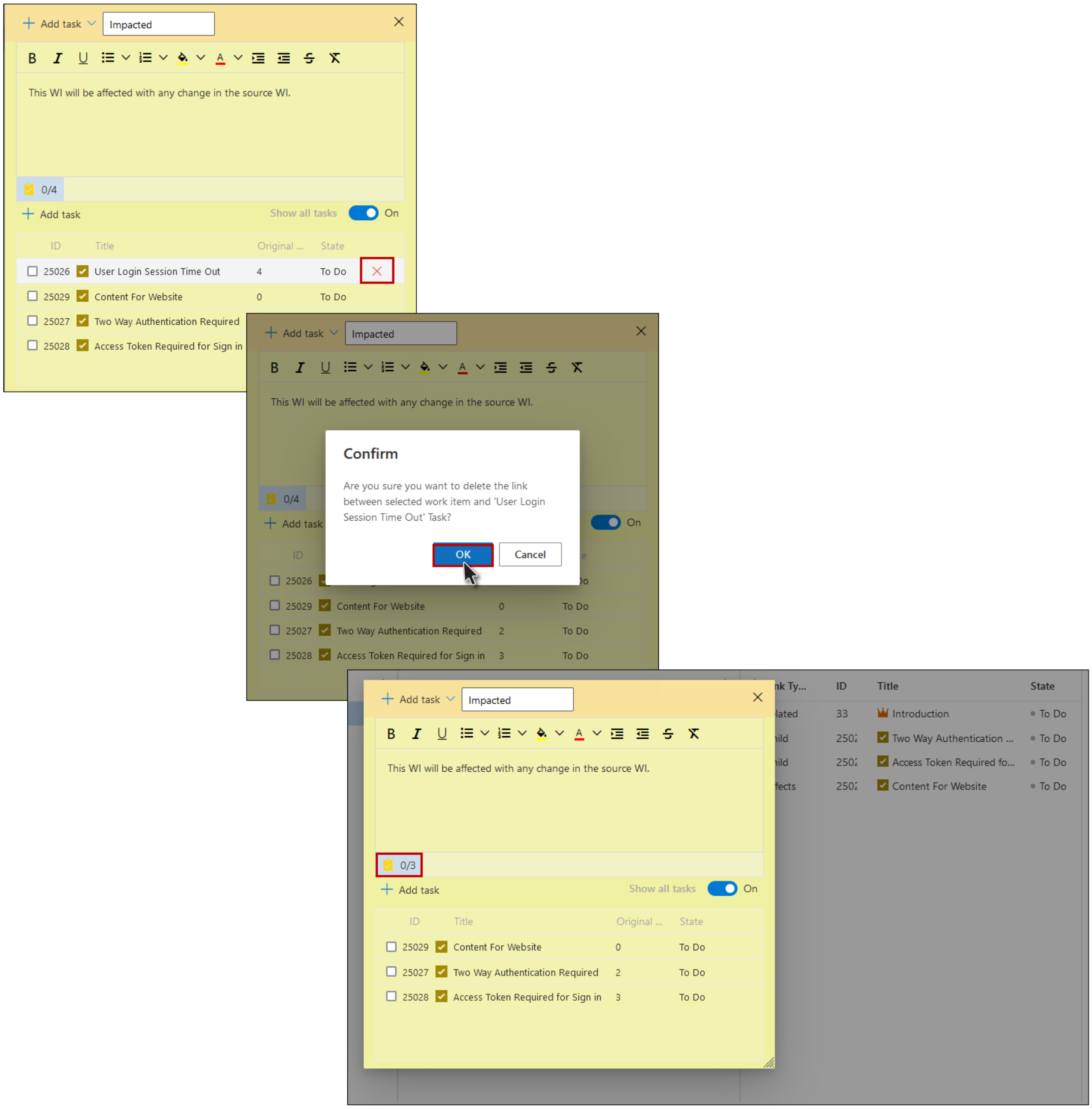
Note: The **toggle button** must be set to **ON** to view the total number of closed and proposed tasks against the work item. When the toggle button is set to **OFF**, the user will only be able to see the counts for tasks that were added or created during **Impact Assessment**.



- By clicking on the **check box**, a user can mark the task(s) as **closed.** When a task is check marked as “**closed**” by the user, it helps identify how many tasks have been completed during the impact among the total number of tasks created.

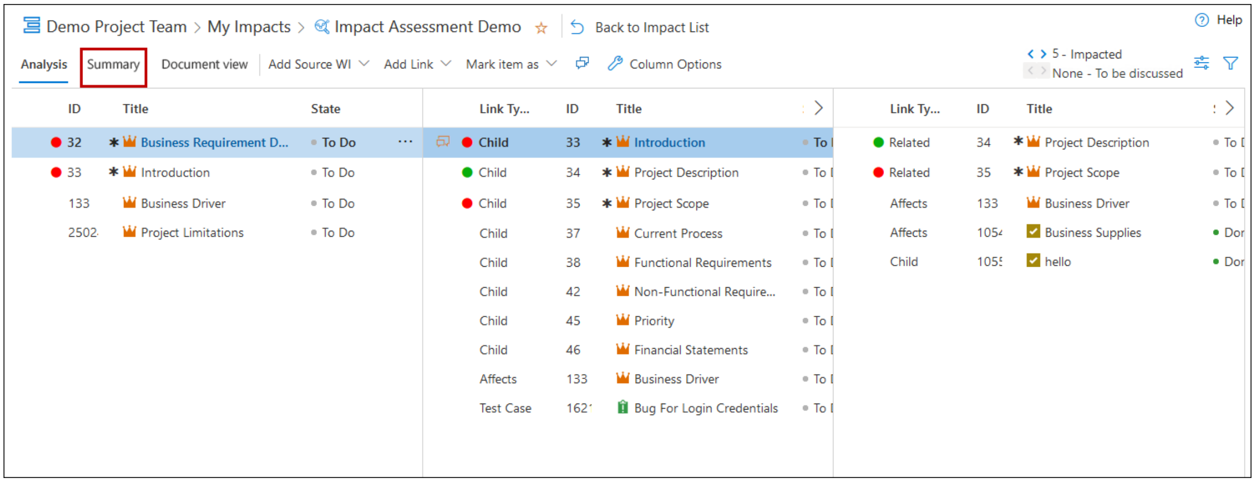


- The user can click on the **X** sign followed by a confirmation dialogue box to **delete** the link between the two WI.

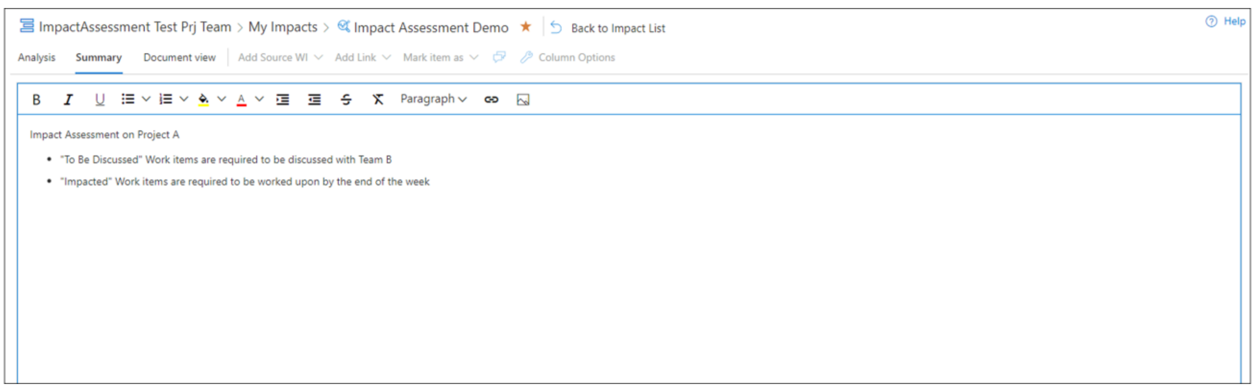


SUMMARY

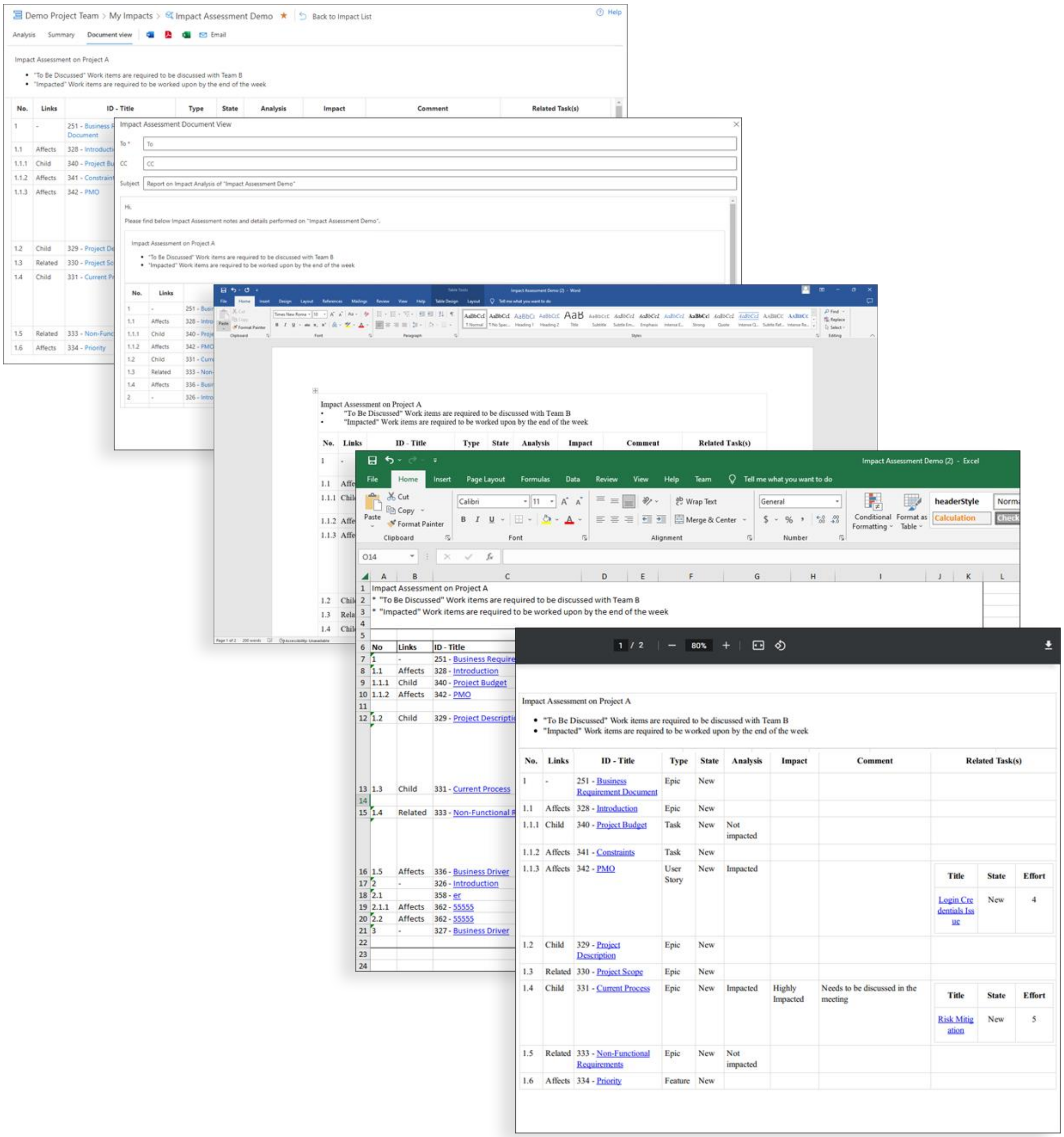
- The **Summary** tab allows the user to record notes for the Impact Assessment.



- The Summary tab in Impact Assessment comes with auto-save functionality. Whatever a user types into it for reference will automatically be saved.

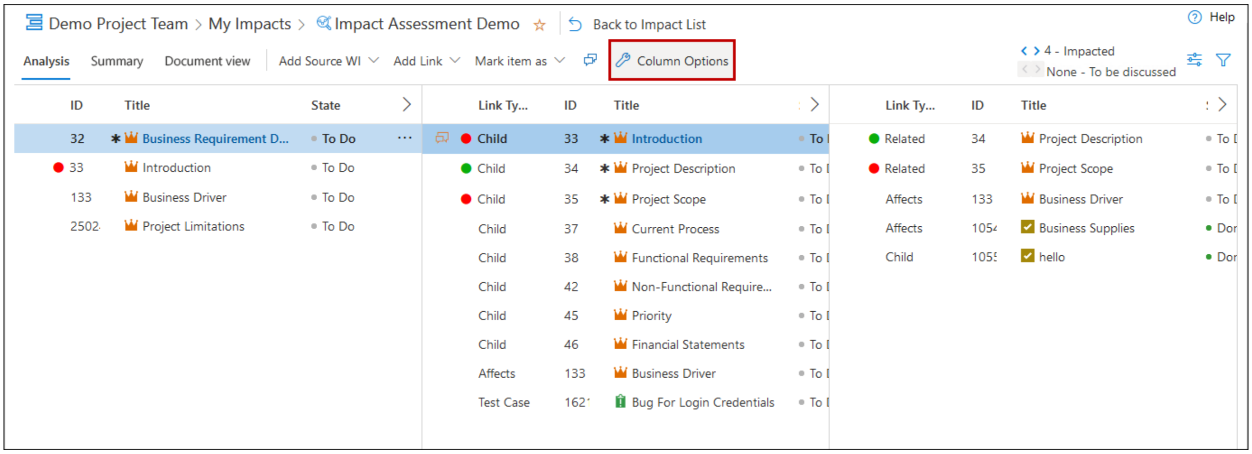


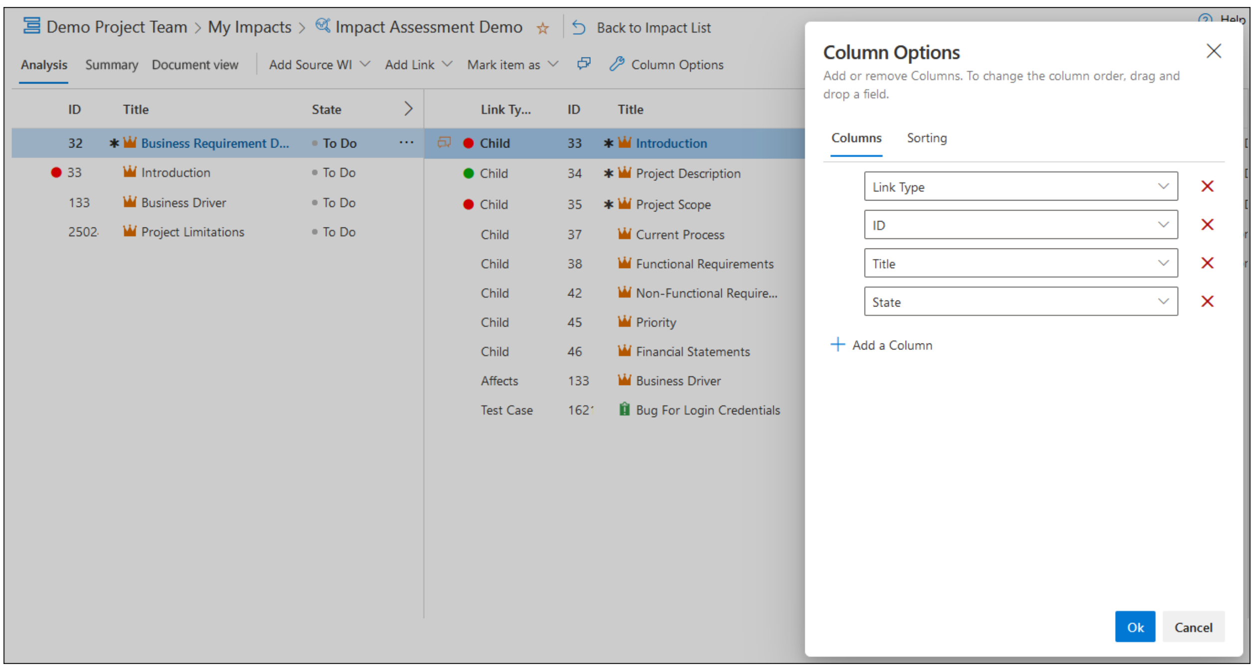
- Any text entered by the user into the Summary **will be reflected in the Document View, E-mail**, **Word**, **Excel**, and **PDF** as shown in the image below.

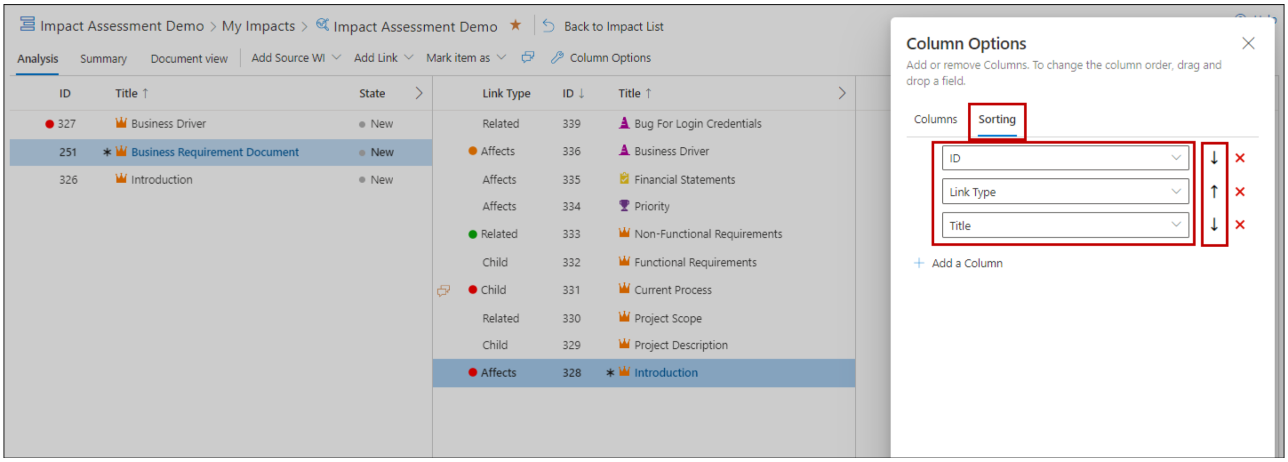


COLUMN OPTIONS

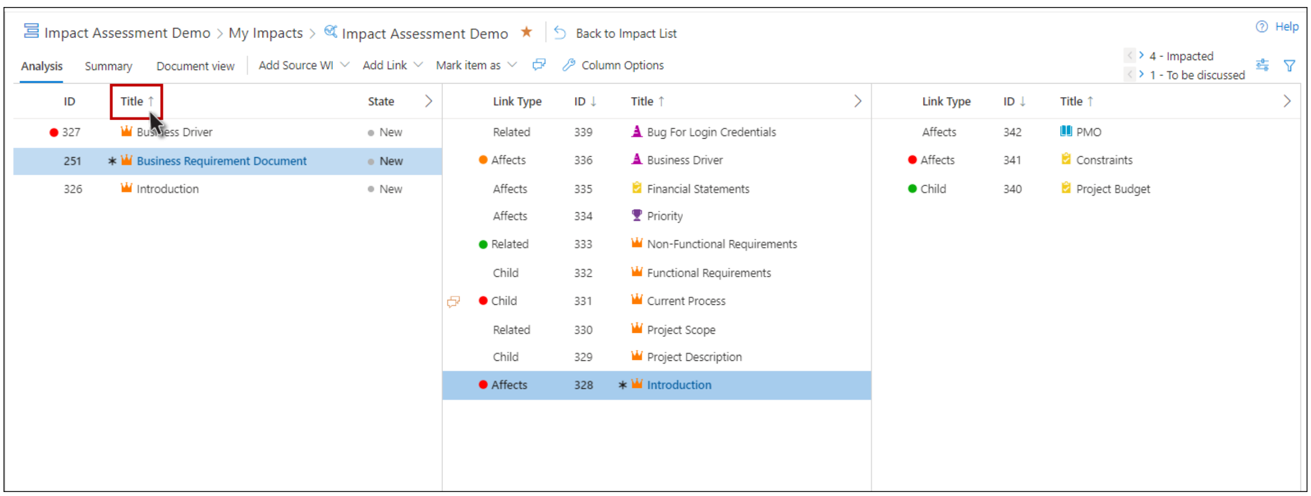
With the **Column Options**, a user can **add** or **remove** columns as per the requirement. The user can also configure multiple sorting with the **Sorting option**.





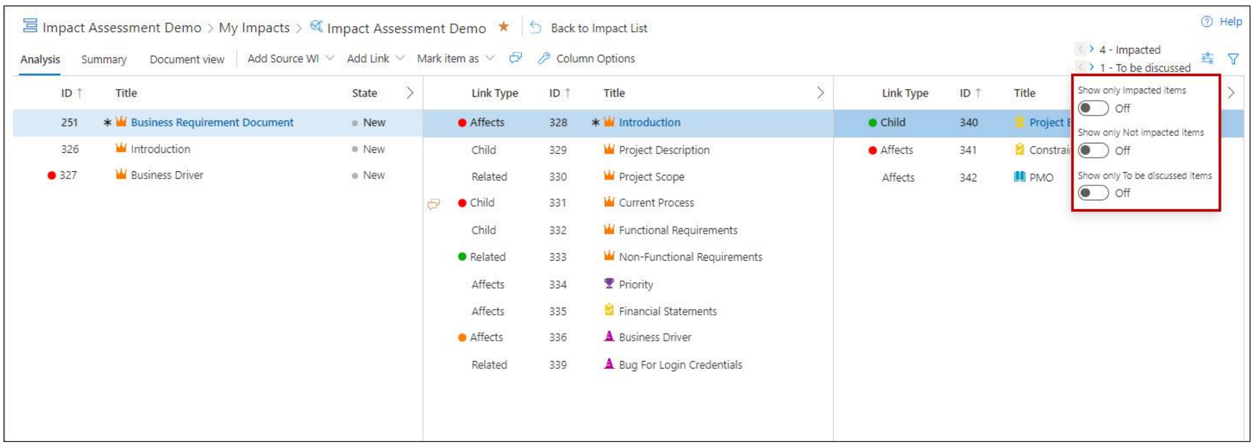


- Users can also apply **sorting** within the specific columns by clicking on the desired field column, such as ID, Title, State, etc.

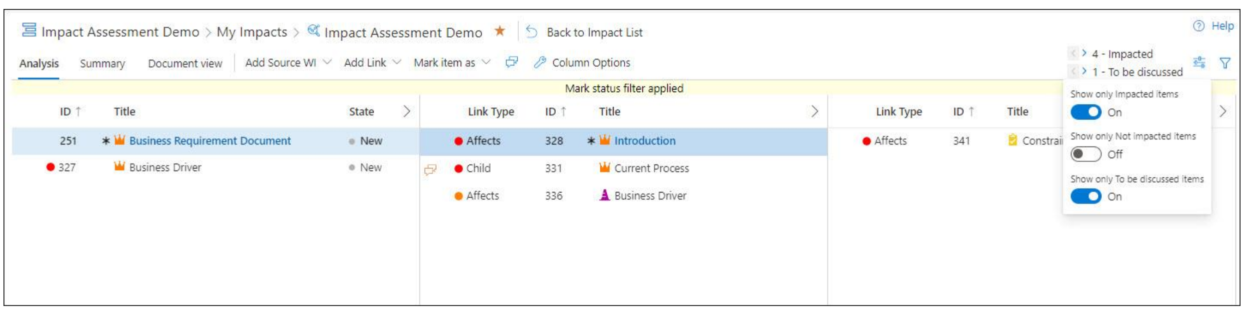


SETTINGS

With the **Settings** option from the tool bar, the user can set the visibility of the Work Items to three different show-only scenarios. The user can choose between **Show only Impacted items**, **Show only Not Impacted Items**, and **Show only To Be Discussed** Items. Since these options are not mutually exclusive, one or more options can be applied at a given time.

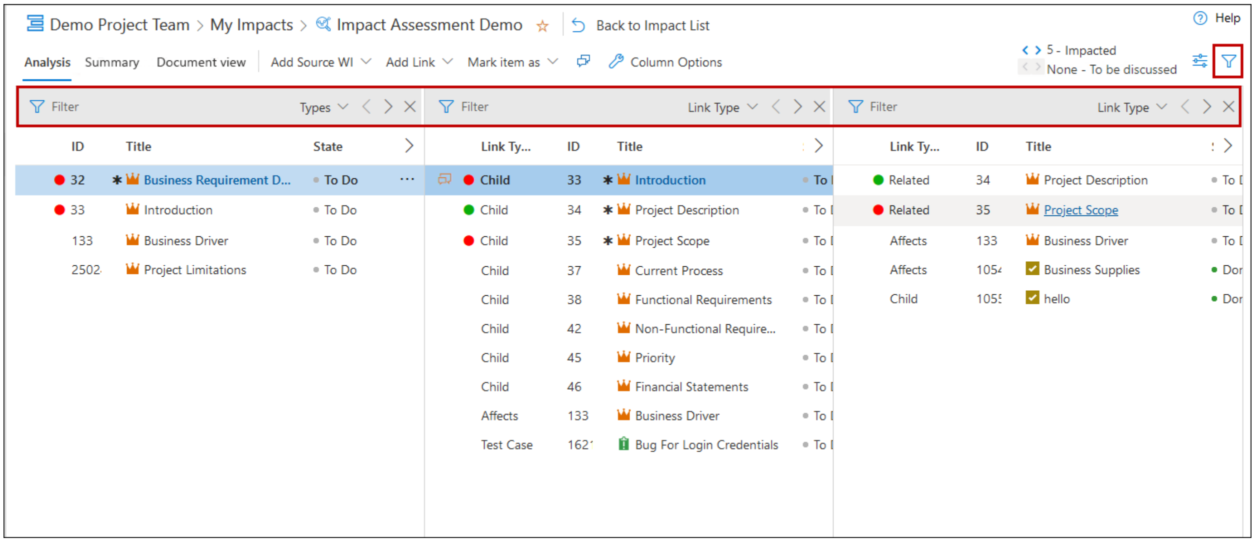


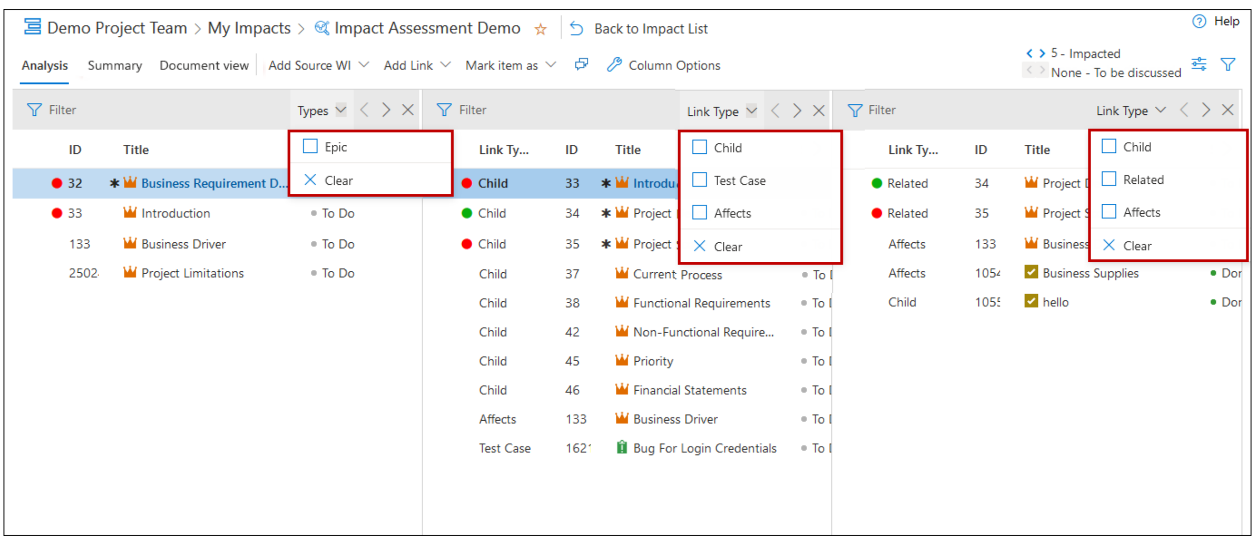
The filter has been applied.



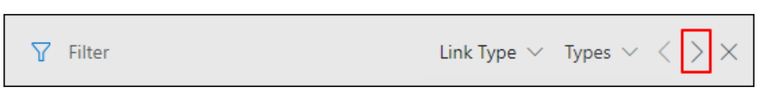
FILTER

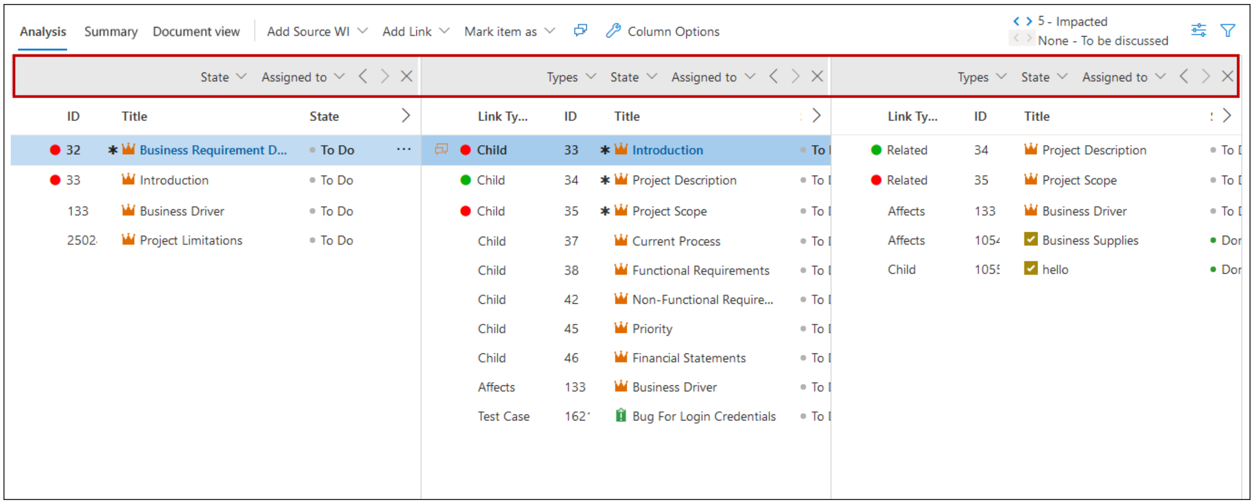
By clicking on the **Filter** icon, as shown in the top right of the below image, a user can invoke the filter options over each of the columns. With the help of the filter option, the user can restrict the visibility of items according to different sets of criteria.





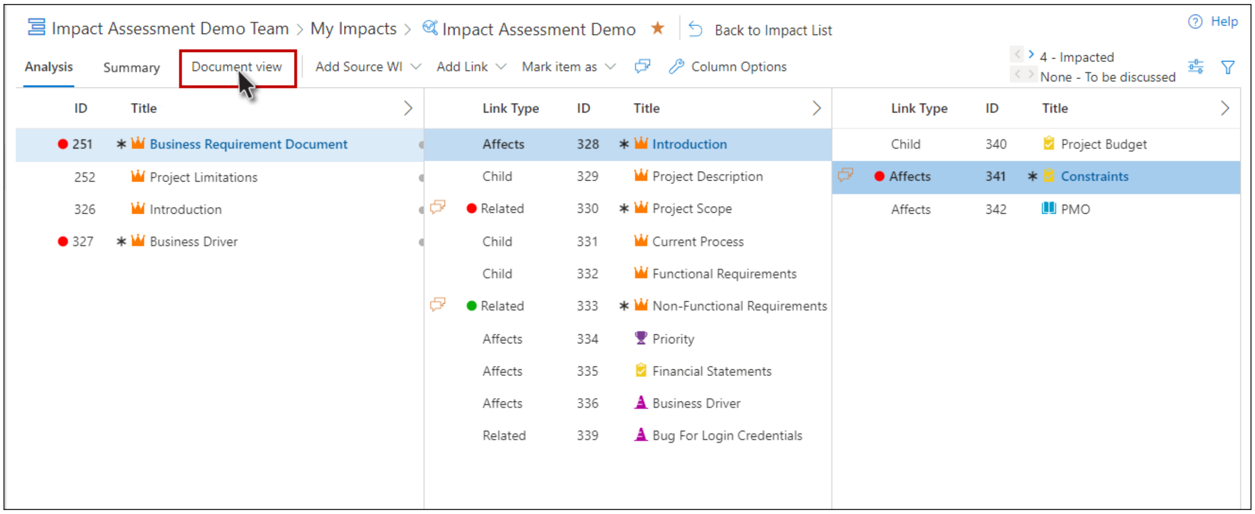
For more filter options against each column, the user needs to click on the **>** icon as shown in the below image.

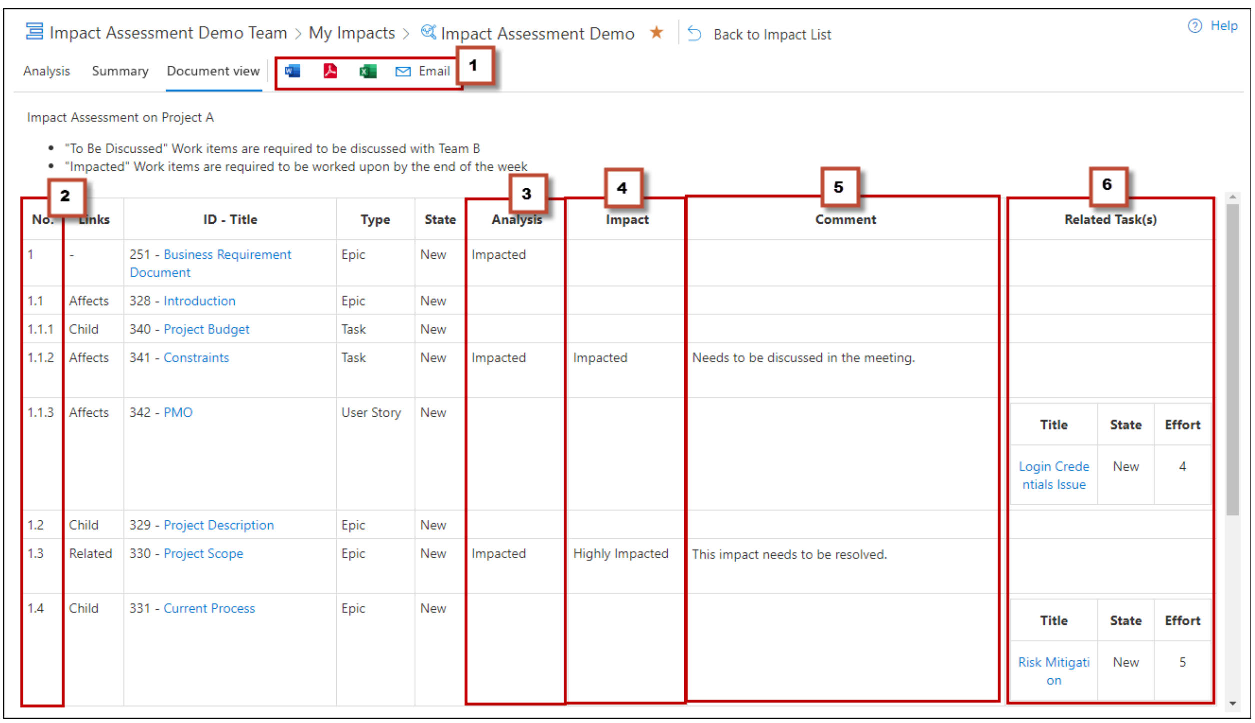



Analysis
Summary
Document view
Add Source WI
Add Link
Mark item as
Column Options
5 - Impacted
None - To be discussed
State
Assigned to
ID
Title
State
32 Business Requirement D... To Do
33 Introduction To Do
133 Business Driver To Do
2502 Project Limitations To Do
Types
State
Assigned to
Link Ty...
ID
Title
Child 33 Introduction
Child 34 Project Description
Child 35 Project Scope
Child 37 Current Process
Child 38 Functional Requirements
Child 42 Non-Functional Require...
Child 45 Priority
Child 46 Financial Statements
Affects 133 Business Driver
Test Case Bug For Login Credentials
Types
State
Assigned to
Link Ty...
ID
Title
Related 34 Project Description
Related 35 Project Scope
Affects 133 Business Driver
Affects Business Supplies
Child hello

DOCUMENT VIEW

Once the Impact Assessment has been performed on all the work items, the user can view the **Impact Assessment Report** in the **Document View** Tab.





1. From the Document View tab, the user has the option to download the Impact Assessment Report in **Word, Excel** and **PDF** format and can also share it through **E-mail**.

2. The first column of the report shows the **hierarchical chain** of all the marked work items.

3. The **analysis** performed through the “Mark item as” option (i.e., Impacted, Not Impacted, and To be Discussed) will be reflected in the Analysis column.

4. The **one-liner description** entered by the user from the Add Comments window will reflect against the respective work item in the Impact column.

5. Comments added by the user from the Add Comments window will be reflected in Comment Column.

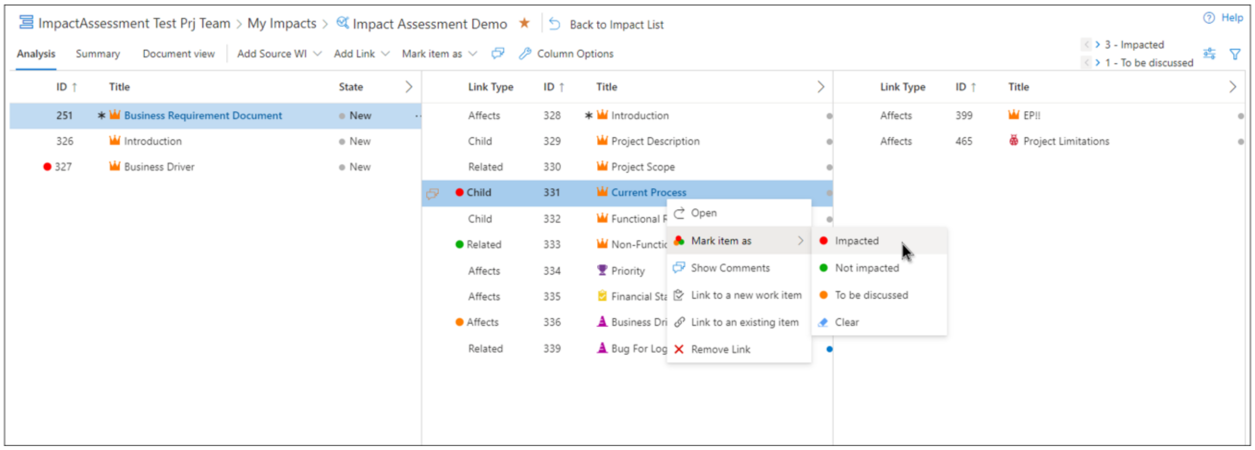
6. **Related Task(s)** are those which were created by the user in the Add Comments window after analyzing the Impact.

Note: Document View **will show all the columns and fields** regardless of any filter that might have been set by the user.

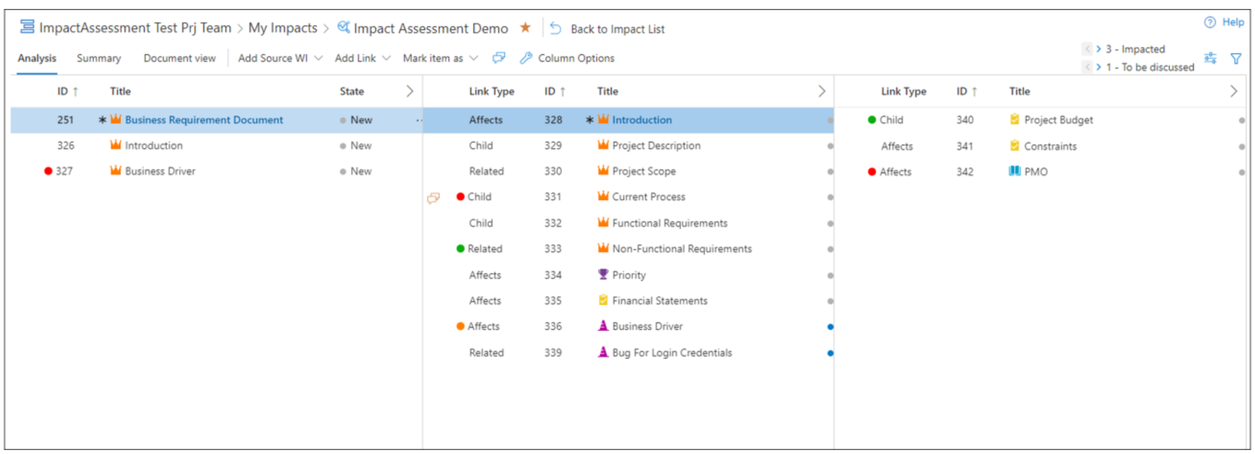
PERFORMING IMPACT ASSESSMENT

While performing Impact Assessment and analyzing the impact of source work item on associated work items, a user can determine whether to mark the associated work items as **Impacted**, **Not Impacted**, and **To be Discussed**.

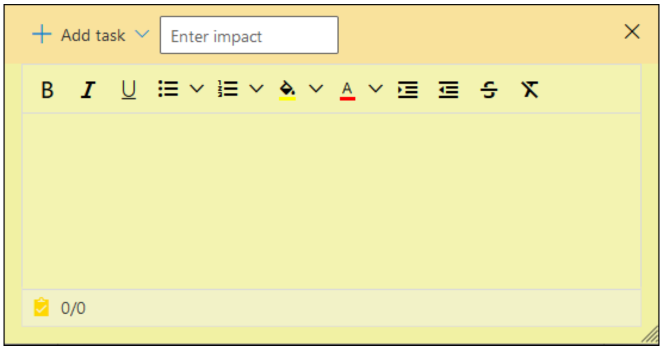
1. Select the work item you want to mark and click on **Mark Item as** (from the toolbar or from the context menu)**.** Now select your desired Impact. For instance, we will mark a work item here as Impacted.



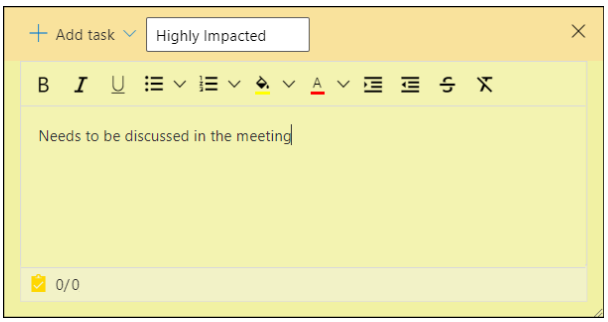
You can mark as many workitems as per your requirements



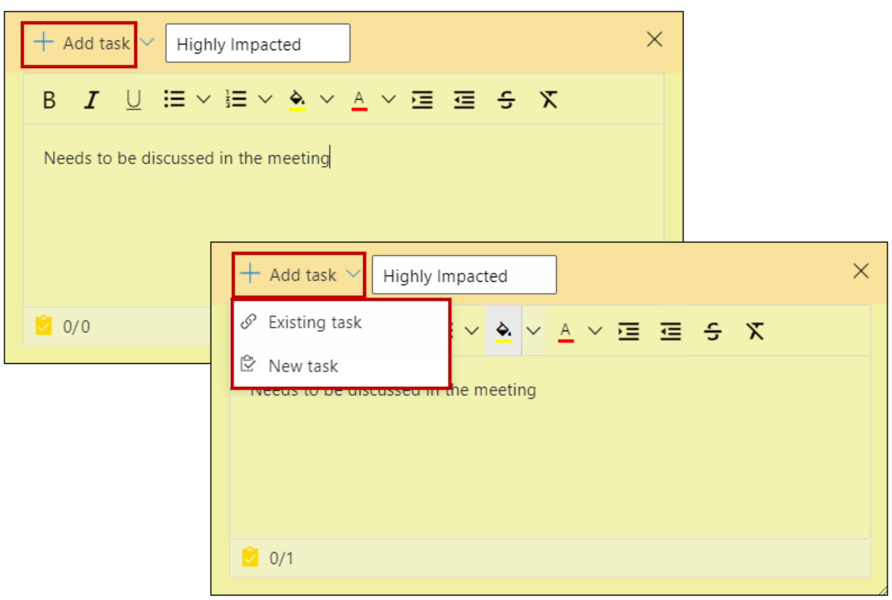
2. When the user clicks on any of the three Impacts the following **comment window** will appear allowing the user to add any relevant details regarding the impact.



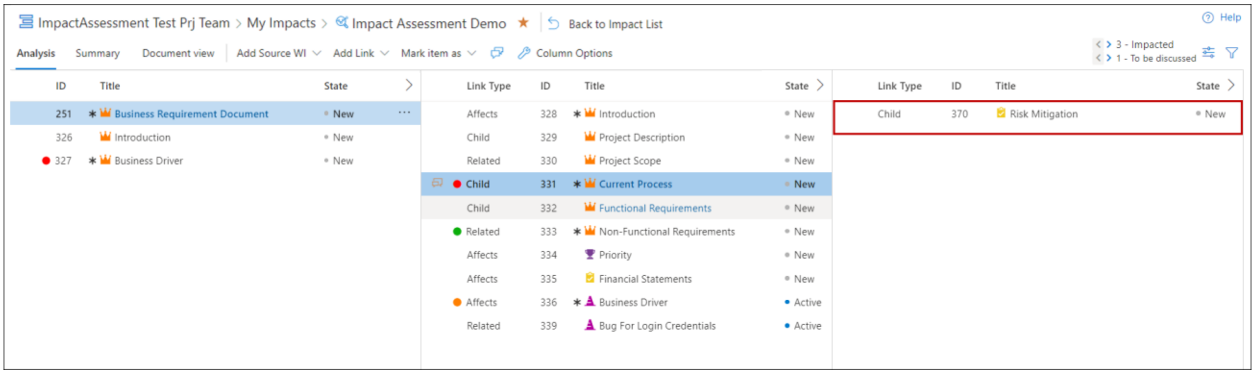
3. Enter the **relevant information** about the Impact on the Work Item in the comment window.



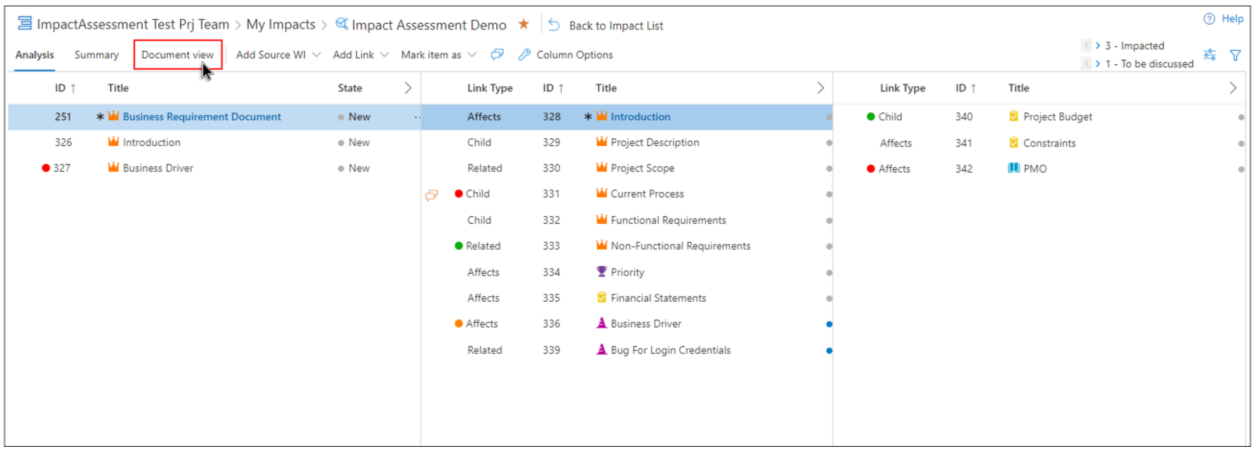
4. In the comment window, a user also has the option to **add task(s)** in light of the Impact and forthcoming changes. The user can either select an existing task or create a new one.

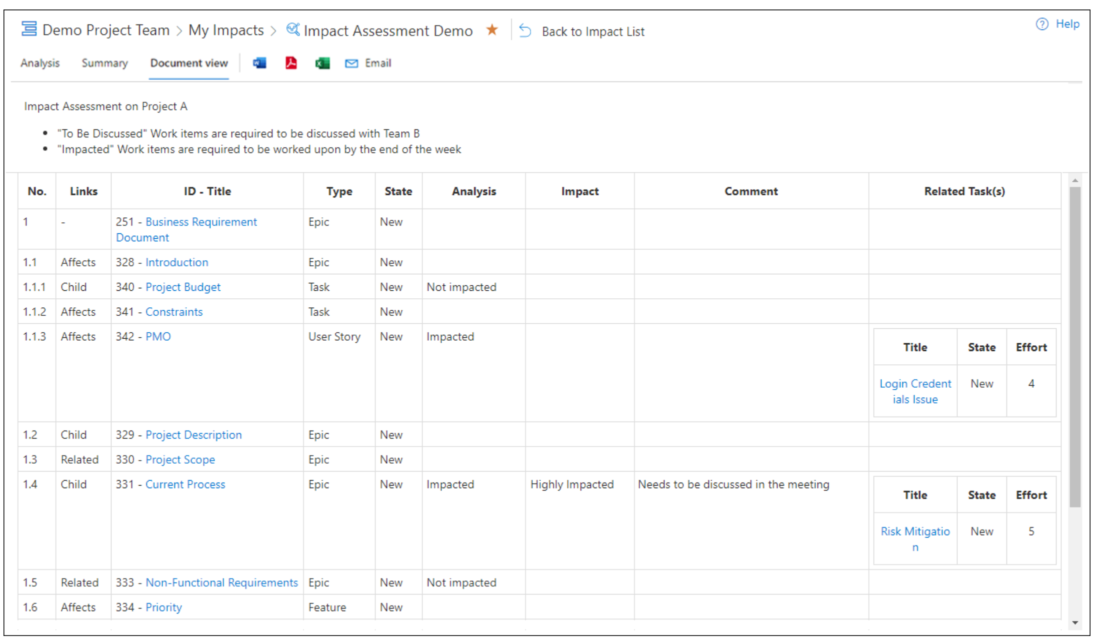


5. Added Existing or New task(s) from the comment window can been seen in the subsequent column.

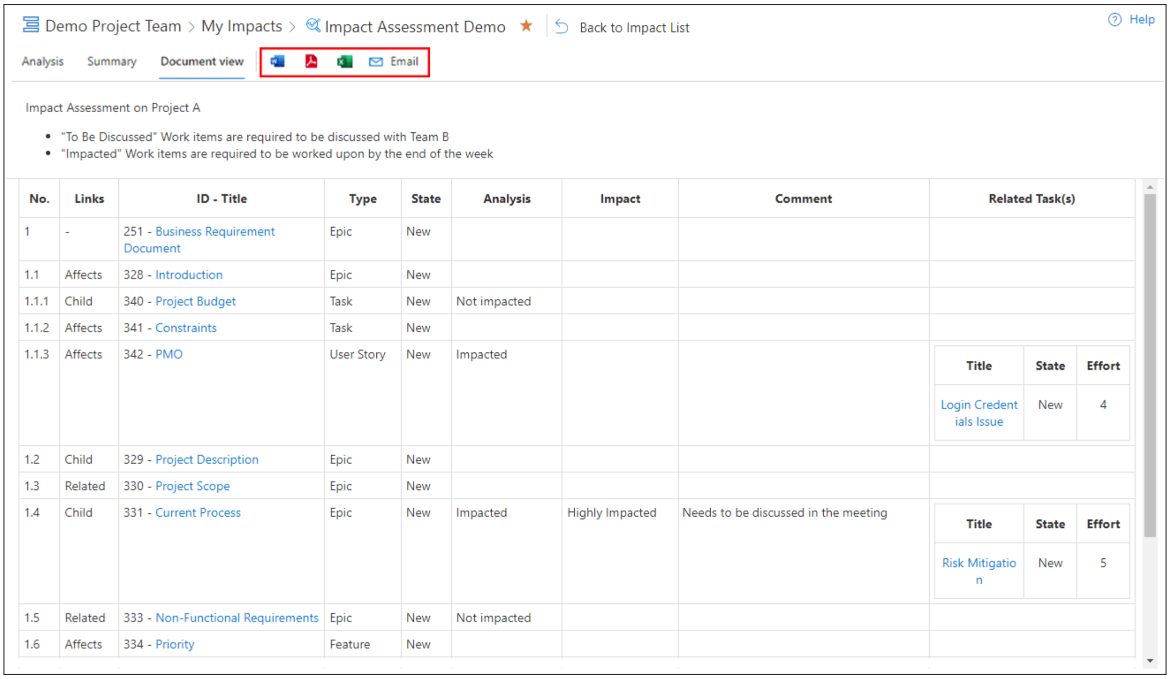


6. Once all the associated work items have been analyzed and marked, the user can view the **Impact Assessment Document View** for the assessment report. The report can be accessed by clicking on the **Document View** tab.





7. In the **Document View** tab, the user can view the Impact Assessment Report, download it in **Word**, **Excel** and **PDF** formats, and also send it via **Email**.

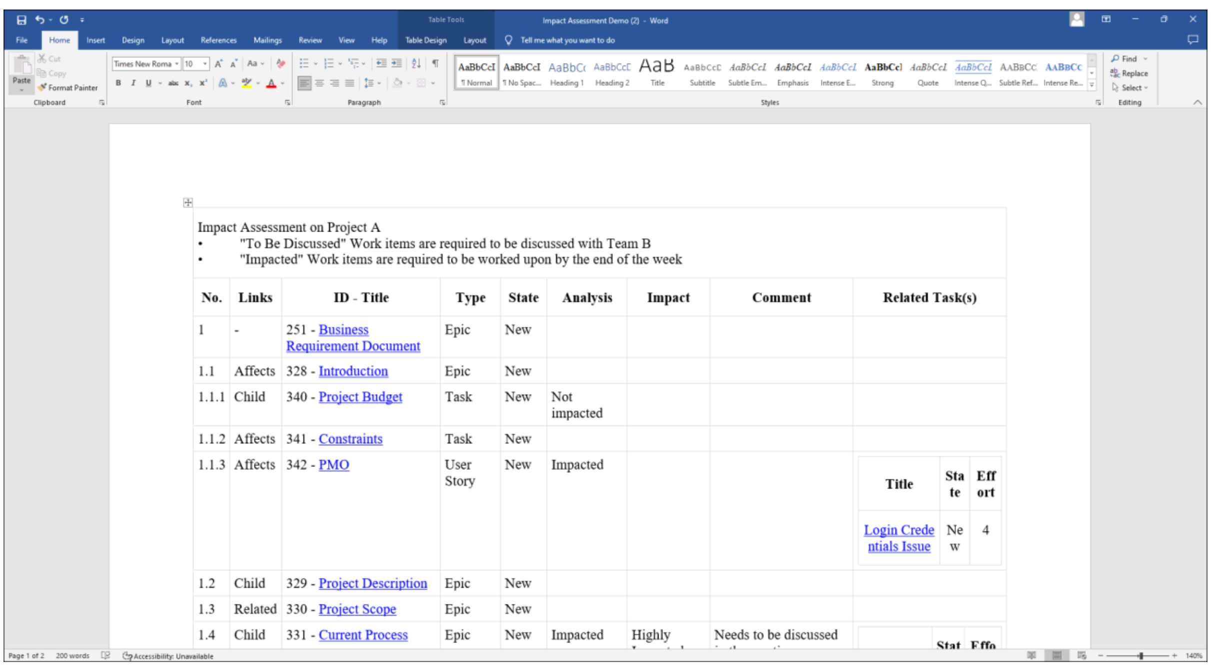


Impact Assessment on Project A

- "To Be Discussed" Work items are required to be discussed with Team B
- "Impacted" Work items are required to be worked upon by the end of the week

No.	Links	ID - Title	Type	State	Analysis	Impact	Comment	Related Task(s)
1	-	251 - Business Requirement Document	Epic	New				
1.1	Affects	328 - Introduction	Epic	New				
1.1.1	Child	340 - Project Budget	Task	New	Not impacted			
1.1.2	Affects	341 - Constraints	Task	New				
1.1.3	Affects	342 - PMO	User Story	New	Impacted			Title: Login Credentials Issue; State: New; Effort: 4
1.2	Child	329 - Project Description	Epic	New				
1.3	Related	330 - Project Scope	Epic	New				
1.4	Child	331 - Current Process	Epic	New	Impacted	Highly Impacted	Needs to be discussed in the meeting	Title: Risk Mitigation; State: New; Effort: 5
1.5	Related	333 - Non-Functional Requirements	Epic	New	Not impacted			
1.6	Affects	334 - Priority	Feature	New				

Impact Assessment Document View - Word



Impact Assessment on Project A

- "To Be Discussed" Work items are required to be discussed with Team B
- "Impacted" Work items are required to be worked upon by the end of the week

No.	Links	ID - Title	Type	State	Analysis	Impact	Comment	Related Task(s)
1	-	251 - Business Requirement Document	Epic	New				
1.1	Affects	328 - Introduction	Epic	New				
1.1.1	Child	340 - Project Budget	Task	New	Not impacted			
1.1.2	Affects	341 - Constraints	Task	New				
1.1.3	Affects	342 - PMO	User Story	New	Impacted			Title: Login Credentials Issue; State: New; Effort: 4
1.2	Child	329 - Project Description	Epic	New				
1.3	Related	330 - Project Scope	Epic	New				
1.4	Child	331 - Current Process	Epic	New	Impacted	Highly	Needs to be discussed	Stat Effo

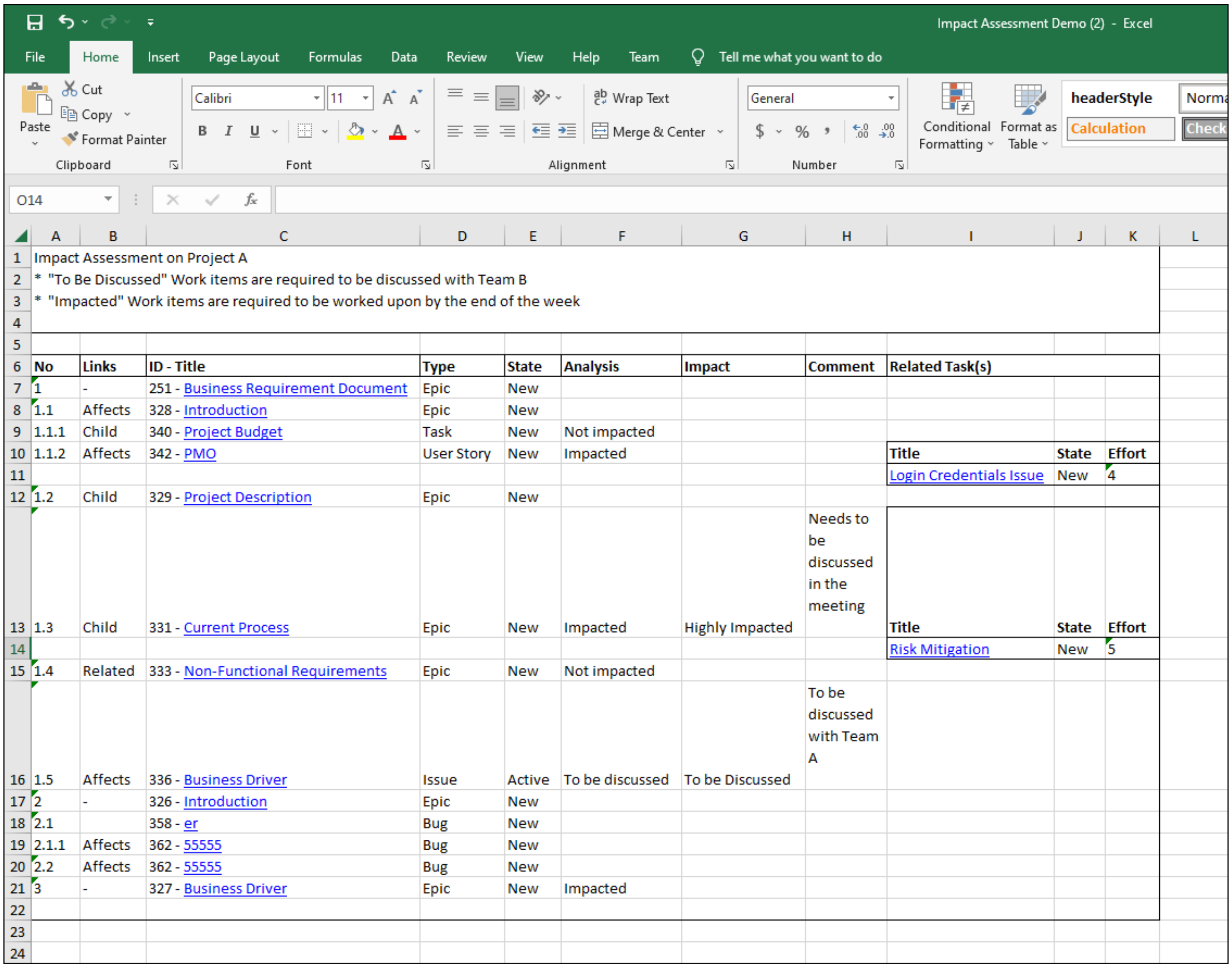
Impact Assessment Document View - PDF

Impact Assessment on Project A

- "To Be Discussed" Work items are required to be discussed with Team B
- "Impacted" Work items are required to be worked upon by the end of the week

No.	Links	ID - Title	Type	State	Analysis	Impact	Comment	Related Task(s)
1	-	251 - Business Requirement Document	Epic	New				
1.1	Affects	328 - Introduction	Epic	New				
1.1.1	Child	340 - Project Budget	Task	New	Not impacted			
1.1.2	Affects	341 - Constraints	Task	New				
1.1.3	Affects	342 - PMO	User Story	New	Impacted			Title: Login Credentials Issue; State: New; Effort: 4
1.2	Child	329 - Project Description	Epic	New				
1.3	Related	330 - Project Scope	Epic	New				
1.4	Child	331 - Current Process	Epic	New	Impacted	Highly Impacted	Needs to be discussed in the meeting	Title: Risk Mitigation; State: New; Effort: 5
1.5	Related	333 - Non-Functional Requirements	Epic	New	Not impacted			
1.6	Affects	334 - Priority	Feature	New				

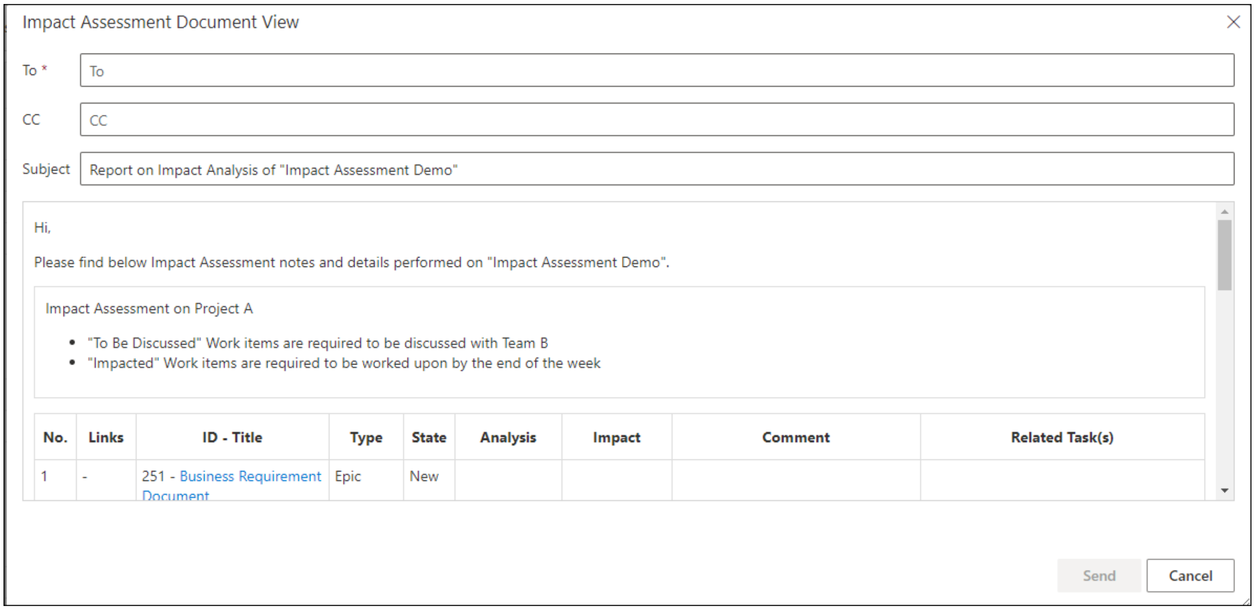
Impact Assessment Document View - Excel



Impact Assessment on Project A
* "To Be Discussed" Work items are required to be discussed with Team B
* "Impacted" Work items are required to be worked upon by the end of the week

No	Links	ID - Title	Type	State	Analysis	Impact	Comment	Related Task(s)		
1	-	251 - Business Requirement Document	Epic	New						
1.1	Affects	328 - Introduction	Epic	New						
1.1.1	Child	340 - Project Budget	Task	New	Not impacted					
1.1.2	Affects	342 - PMO	User Story	New	Impacted			**Title**	**State**	**Effort**
								Login Credentials Issue	New	4
1.2	Child	329 - Project Description	Epic	New						
1.3	Child	331 - Current Process	Epic	New	Impacted	Highly Impacted	Needs to be discussed in the meeting	**Title**	**State**	**Effort**
								Risk Mitigation	New	5
1.4	Related	333 - Non-Functional Requirements	Epic	New	Not impacted					
1.5	Affects	336 - Business Driver	Issue	Active	To be discussed	To be Discussed	To be discussed with Team A			
2	-	326 - Introduction	Epic	New						
2.1		358 - er	Bug	New						
2.1.1	Affects	362 - 55555	Bug	New						
2.2	Affects	362 - 55555	Bug	New						
3	-	327 - Business Driver	Epic	New	Impacted					

EMAIL


Impact Assessment Document View
To *
To
CC
CC
Subject
Report on Impact Analysis of "Impact Assessment Demo"
Hi,
Please find below Impact Assessment notes and details performed on "Impact Assessment Demo".
Impact Assessment on Project A
"To Be Discussed" Work items are required to be discussed with Team B
"Impacted" Work items are required to be worked upon by the end of the week
No. Links ID - Title Type State Analysis Impact Comment Related Task(s)
1 - 251 - Business Requirement Document Epic New
Send
Cancel